

EXHIBIT A

**(PREVIOUSLY
FILED AS ECF
673-3)**

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

**UNITED STATES DISTRICT COURT
EASTERN DISTRICT OF TEXAS
SHERMAN DIVISION**

The State of Texas, et al.,

Plaintiffs,

vs.

Case No. 4:20-cv-00957

Google, LLC,

Defendant.

EXPERT REPORT OF ITAMAR SIMONSON, PH.D.

July 30, 2024

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

TABLE OF CONTENTS

I.	BACKGROUND, QUALIFICATIONS, AND ASSIGNMENT	1
A.	Background and Qualifications.....	1
B.	Assignment	6
II.	SUMMARY OF CONCLUSIONS	7
III.	INTRODUCTION	14
A.	Overview of Survey Design.....	14
B.	Sample Selection and Survey Administration	20
IV.	HIGHER-SPEND ADVERTISER SURVEY	24
A.	Overview.....	24
B.	Methodology	25
1.	Survey Universe and Screening Criteria.....	25
2.	Main Questionnaire.....	35
C.	Survey Findings	50
D.	Key Implications of the Findings.....	68
V.	LOWER-SPEND ADVERTISER SURVEY	71
A.	Overview.....	71
B.	Methodology	72
1.	Survey Universe and Screening Criteria.....	72
2.	Main Questionnaire.....	76
C.	Survey Findings	81
D.	Key Implications of the Findings.....	101
VI.	AD AGENCY SURVEY	103
A.	Overview.....	103
B.	Methodology	104
1.	Survey Universe and Screening Criteria.....	104
2.	Main Questionnaire.....	108
C.	Survey Findings	110
D.	Key Implications of the Findings.....	127

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

preparation of this report under my direction and supervision. My compensation is not dependent in any way on the outcome of this litigation.

B. Assignment

13. I was asked by counsel for Google, LLC (“Google”) to conduct surveys designed to examine how advertisers at companies and advertisers at ad agencies (collectively, “advertisers”) approach, manage, and evaluate digital advertising and, in particular, display advertising and programmatic display advertising.⁴ Specifically, I was asked to address the following issues:

- a. identifying considerations that are relevant for advertisers’ budgeting decisions, including how and where they allocate advertising spending;
- b. examining advertisers’ potential reactions to changing display advertising costs;
- c. examining advertisers’ use of ad buying tools for programmatic display advertising;
- d. identifying methods that are implemented by advertisers to assess advertising performance;

⁴ As described in more detail below, “display advertising” was defined to these survey participants as: “digital ads made up of text, image, video, and/or other multimedia components that typically appear along the top or sides of a website, or sometimes in the middle of other content on a website. Examples of display ad formats include banner ads, animations, and interactive content. Display ads do not include ads placed on social media platforms.” As described below in paragraph 52, these definitions were created for purposes of these surveys only, in order to test—among other things—the degree to which advertisers viewed certain types of ads, including ads placed on social media platforms, as substitutes for other types of display ads. I did not conduct a survey to determine how advertisers use the terms “display” or “social.” In the Higher-Spend Advertiser Survey and Agency Survey, “programmatic ads” were defined as: “ads that...are transacted and fulfilled using automation. In programmatic transactions, the price of each impression is typically determined in an auction conducted automatically before the impression is served.” As discussed in more detail below, because lower-spend advertisers might not regularly differentiate between programmatic and direct deals transaction methods, I did not refer to programmatic ads and instead asked about display advertising more generally in the Lower-Spend Advertiser Survey.

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

- e. examining use of advertising agencies by advertisers at companies; and
- f. examining advertisers' sophistication and use of experiments.

14. The documents that I relied upon in connection with my work in this matter are listed in Appendix C.

15. My analysis may change before trial if additional information from any of the parties or their experts becomes available. I, therefore, reserve the right to supplement my report accordingly.

II. SUMMARY OF CONCLUSIONS

16. The three surveys described in this report examined how advertisers manage, monitor and make decisions concerning digital advertising, in general, and programmatic display advertising, in particular. The participants were involved in making decisions concerning digital advertising on behalf of their companies (or clients in the case of ad agencies). The final tabulated samples included 502 “higher-spend advertisers” (spending over \$500,000 annually on advertising), 302 “lower-spend advertisers” (spending less than \$500,000 annually on advertising, including 138 advertisers who spend less than \$50,000 annually on advertising), and 381 respondents from advertising agencies, all of whom were based in the U.S.

17. The surveys were designed to determine advertisers' actual choices and considerations, as well as their evaluations of alternative advertising buying tools and the manner in which they assess the cost effectiveness of these tools. In addition, participants were given a scenario and asked to indicate how they would respond in case the cost of programmatic display advertising increases by “a small but significant amount.”⁵

⁵ This phrase was designed to leave it to the respondents to consider their reaction, if any, if (what they consider to be) “a small but significant” increase in the cost of programmatic display advertising occurred. *See* paragraph 65.

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

22. Prior to designing the survey questionnaires, I arranged for 14 preliminary interviews to be conducted with advertisers with a range of different spending levels as well as with ad agencies to explore some of the topics the survey would ultimately examine.⁹ The interviewer was an employee of Analysis Group who was on the team which assisted me with the surveys. I listened to all of these interviews.

23. To obtain live reactions from interviewees while answering the questions, respondents were given the following instructions:

When answering, please give as much detail as possible. However, if you do not know the answer, that is okay -- just let me know.

24. This technique is known in the scientific literature as “think-aloud protocols,” which has advantages and some limitations in terms of capturing respondents’ understanding and interpretation of the questions in real time.¹⁰ I used the feedback and responses of the interview participants to inform the development of the survey questions.

25. In designing the survey questions, it was important to recognize potential differences between different groups of advertisers that might affect their understanding of certain industry-specific terminology or otherwise affect the question phrasing. Ultimately, I designed three survey questionnaires tailored to different groups of respondents: “higher-spend advertisers” spending more than \$500,000 on advertising in the past year (the “Higher-Spend Advertiser Survey”), “lower-spend advertisers” spending less than \$500,000 on advertising in the past year (the “Lower-Spend Advertiser Survey”), and individuals at ad agencies (the “Ad Agency

⁹ The initial interview participants were members of the same Advertiser Perceptions panel (described below) that was used for the online surveys. To avoid overlap, I requested that respondents who participated in the preliminary interviews not be invited to participate in the subsequent surveys. See Appendix D for the discussion guide used during the preliminary interviews.

¹⁰ For a review, see, e.g., Robert Crutcher (1994), “Telling What We Know: The Use of Verbal Report Methodologies in Psychological Research,” *Psychological Science*, Vol. 5, No. 5, pp. 241-248; see also Itamar Simonson (1989), “Choice Based on Reasons: The Case of Attraction and Compromise Effects,” *Journal of Consumer Research*, Vol. 16, pp. 158-174.

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

to what is known as “focalism”²⁰ and possible “demand effects.”²¹ Thus, respondents were informed only at the conclusion of the survey about its sponsor and were given the option to indicate that their responses should not be included in any statistical or other analysis of the findings, which was implemented accordingly (*i.e.*, I have not received any information about their responses and those responses are not included in the results described in this report or any other analysis).²²

28. After developing the survey questionnaires, I subsequently arranged to conduct a dozen additional interviews, or “pre-tests,” of the questionnaires.^{23, 24} Instead of think-aloud protocols, participants in these subsequent pre-test interviews completed the survey on their own, but they were asked a few additional questions at the conclusion of the survey. The questions were the following:

- Did you have any problems or difficulties taking the survey?
- Did you think any questions were unclear? If so, which ones and why?
- Did you think any answer options were unclear? If so, which ones and why?

²⁰ See, e.g., Timothy D. Wilson and Daniel T. Gilbert (2003), “Affective Forecasting,” *Advances in Experimental Social Psychology*, Vol. 35, pp. 345-411, at pp. 366-369. See also Daniel Kahneman, et al. (2006), “Would You Be Happier If You Were Richer? A Focusing Illusion,” *Science*, Vol. 312, pp. 1908-1910, at p. 1908; David Gal and Itamar Simonson (2020), “Predicting Consumers’ Choices in the Age of the Internet, AI, and Almost Perfect Tracking: Some Things Change, the Key Challenges Do Not,” *Consumer Psychology Review*, Vol. 4, No. 1, pp. 1-18.

²¹ See, e.g., Itamar Simonson and Ran Kivetz (2012), “Demand Effects in Likelihood of Confusion Surveys: The Importance of Marketplace Conditions,” in *Trademark and Deceptive Advertising Surveys: Law, Science, and Design*, Chapter 11, Shari S. Diamond and Jerre B. Swann, Eds., American Bar Association, pp. 243-259, at p. 243. See also Alan G. Sawyer (1975), “Demand Artifacts in Laboratory Experiments in Consumer Research,” *Journal of Consumer Research*, Vol. 1, No. 4, pp. 20-30, at pp. 20-21.

²² As described later, the surveys did not include a “Back” button and disabled the “Back” option in respondents’ browsers. See Appendix F.1, at F.1-2. Therefore, respondents were not able to change their previous answers after being informed about the survey sponsor.

²³ Specifically, five pre-tests of the Higher-Spend Advertiser Survey questionnaire, three pre-tests of the Lower-Spend Advertiser Survey questionnaire, and four pre-tests of the Ad Agency Survey questionnaire were conducted. Pre-tests can help determine whether survey questions were clear and unambiguous.

²⁴ See, e.g., Bradburn et al (2004), at p. 317 (“[A] pretest will help you determine if the questionnaire is gathering the data you need and whether it is convenient and clear for respondents to fill out. Additionally, a pretest will often suggest problems you were unaware of, and it can help you avoid costly mistakes.”).

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

- Did any questions in the survey make you feel that you should answer one way or the other? If so, which ones and why?
- What do you think might be the purpose for conducting this survey? What makes you think so?
- Is there anything else you would like to say about the survey?²⁵

29. Overall, the results of these pre-test interviews indicated that, consistent with my prior experience with similar survey questions, the questions in this survey were clear, and respondents encountered no difficulties understanding the questions.²⁶

B. Sample Selection and Survey Administration

30. All surveys were administered via the Internet in September and October 2023. The samples of advertisers and of ad agency employees were obtained through Advertiser Perceptions (“AP”). A “leading provider of research-based strategic market intelligence and analysis to the media, advertising and ad tech industry,”²⁷ AP has specialized in understanding the advertising market and advertising decision makers.²⁸ This allowed them to reach a large pool of confirmed advertisers at companies and employees at ad agencies. AP regularly surveys advertisers at companies and employees at ad agencies to generate reports for use by companies

²⁵ See Appendix E.

²⁶ Given these results, I did not make any changes to the survey questionnaires based on the results of the pre-tests.

²⁷ Business Wire, “Eureka Equity Partners Announces Investment in Advertiser Perceptions,” <https://www.businesswire.com/news/home/20230216005622/en/Eureka-Equity-Partners-Announces-Investment-in-Advertiser-Perceptions> (viewed 9/24/2023).

²⁸ For example, Advertiser Perceptions publishes a series of “DSP Reports” summarizing insights from a survey of advertising decision makers. See, e.g., GOOG-DOJ-11021167-216; GOOG-DOJ-AT-00748293-396; GOOG-DOJ-AT-00839664-764; GOOG-DOJ-AT-02524665-749; GOOG-AT-MDL-001272416-493.

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

in the advertising space.²⁹ AP also frequently runs surveys at the request of specific companies seeking to understand advertisers' decisions, considerations, and expected responses to changes.³⁰

31. AP maintains a proprietary "AdPROs" panel and works with a variety of third-party survey panels to recruit qualified respondents.³¹ The AdPROs panel includes U.S.-based respondents who are brand marketers, agency executives, media specialists, digital publishers, and IT leaders directly involved in media and ad tech purchase decisions.³² Notably, the ADPROs panel includes "[q]uantitative and qualitative respondents covering the world's top brands and agencies – including 100% of the Ad Age Top 200 Advertisers and controlling \$165B+ of annual ad spend."³³

32. For each of the surveys described in this report, members of AP's AdPROs panel and third-party partner panels were invited to participate in the survey via email. Up to two reminder emails were sent to participants who did not complete the survey within three to four days of the initial invite.

²⁹ See, e.g., GOOG-DOJ-11021167-216; GOOG-DOJ-AT-00748293-396; GOOG-DOJ-AT-00839664-764; GOOG-DOJ-AT-02524665-749. See also Advertiser Perceptions, "Data-Driven Market Intelligence: For More Effective New Business and Client Retention Pitches," <https://advertiserintelligence.com> (viewed 10/2/2023); Advertiser Perceptions, "What Advertisers Think," 2016, available at <https://www.advertiserperceptions.com/wp-content/uploads/2016/08/2016-AP-Company-Brochure.pdf>, at pp. 6, 17-18.

³⁰ Advertiser Perceptions, "Key Business Intelligence That Drives Results: Take Actions Based on Data-Driven Strategic Sales & Marketing Recommendations," <https://www.advertiserperceptions.com/results/> (viewed 10/2/2023); Advertiser Perceptions, "What Advertisers Think," 2016, available at <https://www.advertiserperceptions.com/wp-content/uploads/2016/08/2016-AP-Company-Brochure.pdf>, at pp. 2, 6, 17-18.

³¹ Advertiser Perceptions, "2023 Ad Pros Page - Advertiser Perceptions," <https://www.advertiserperceptions.com/join-ap-ad-pros/> (viewed 9/24/2023).

³² Advertiser Perceptions, "2023 Ad Pros Page - Advertiser Perceptions," <https://www.advertiserperceptions.com/join-ap-ad-pros/> (viewed 9/24/2023); Advertiser Perceptions, "What Advertisers Think," 2016, available at <https://www.advertiserperceptions.com/wp-content/uploads/2016/08/2016-AP-Company-Brochure.pdf>, at p. 7.

³³ Advertiser Perceptions, "2023 Ad Pros Page - Advertiser Perceptions," <https://www.advertiserperceptions.com/join-ap-ad-pros/> (viewed 9/24/2023).

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

33. AP has a standard process they put in place to generate survey samples that are representative of the advertiser population they are intended to reflect.³⁴ Specifically, AP maintains estimates of the distribution of U.S. based advertisers across a variety of metrics, including company size, annual media spend, industry/sector, advertiser title, and demographic information such as age, gender, and region. At my direction, and in accordance with their standard practices, AP sent invitations to panel members to generate an inbound sample³⁵ that was representative of the U.S. advertiser population accounting for the vast majority of spending.³⁶

34. At the direction of counsel, I asked AP to pre-screen respondents to ensure that they did not work for any companies that are parties to, were identified on initial disclosures in, or have received subpoenas in connection with *United States v. Google LLC*, No. 1:23-cv-00108 (E.D. Va.), the cases consolidated in *In re Google Digital Advertising Antitrust Litigation*, No. 1:21-md-03010 (S.D.N.Y.), and/or *Texas v. Google LLC*, No. 4:20-cv-00957 (E.D. Tex.).³⁷ Respondents who work for companies on this list did not participate in any of the surveys. To the extent those companies are, on average, more sophisticated advertisers, then my results would likely be conservative on key topics such as multi-homing (*i.e.*, the use of multiple ad buying tools and/or

³⁴ See, e.g., GOOG-DOJ-AT-02524665-749, at 666-667; GOOG-DOJ-AT-00839664-764, at 666-667, 726; GOOG-DOJ-11021167-216, at 168; GOOG-AT-MDL-002038336-380, at 337-338. According to AP, their “proprietary database and panels of media decision makers are large and responsive” and the “advertiser survey and questionnaire development process that [they] employ is proven and ensures optimal response.” Advertiser Perceptions, “What Advertisers Think,” 2016, available at <https://www.advertiserperceptions.com/wp-content/uploads/2016/08/2016-AP-Company-Brochure.pdf>, at p. 18.

³⁵ The “inbound sample” refers to the sample of respondents who clicked into the survey link provided in the invitation. AP’s approach of generating a representative inbound sample is similar to the methodology applied by many other panel providers I have worked with in the past.

³⁶ For the Higher-Spend Advertiser Survey, in order to generate sufficiently large sample sizes across different spending levels, AP generated a sample with equal proportion of respondents within the \$500,000 to \$15,000,000 annual ad spend range and the \$15,000,000+ annual ad spend range. However, AP applied their standard practice to generate a representative inbound sample within those sub-groups.

³⁷ The relevant companies are identified in Appendix I.

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

advertising types) and substitution across advertising types in response to cost increases, which likely requires greater experience and expertise.³⁸

35. While conducting the analyses described throughout this report, I also examined whether key results differed by demographics or advertiser spend (*e.g.*, whether male respondents are more or less likely to multi-home than female respondents) and found that, by and large, the results are generally consistent across different subgroups.³⁹ In addition to the standard process AP put in place to generate survey samples that are representative, this consistency supports that the survey results are not meaningfully impacted by the specific composition of the sample (*e.g.*, the number of male respondents versus female respondents).

36. As part of the quality control process, AP uses Research Defender, a digital fingerprinting and fraud detection platform,⁴⁰ to exclude bots and manage duplication across sample partners, in addition to other internal metrics such as speeders (*i.e.*, respondents who completed the survey in a very short amount of time), straight liners (*i.e.*, respondents who gave the same answer for a series of questions), inconsistencies in responses, and low-quality open-ended responses. Respondents who completed the survey were compensated in points redeemable for cash, equivalent to approximately \$10 to \$20.⁴¹

37. For each survey, the final dataset provided by AP included all respondents who entered the survey, passed AP's quality control process, and did not choose to exclude their

³⁸ For a general overview of the literature on the effect of knowledge and expertise, *see, e.g.*, Joseph W. Alba and J. Wesley Hutchinson (1987), "Dimensions of Consumer Expertise," *Journal of Consumer Research*, Vol. 13, No. 4, pp. 411- 454.

³⁹ *See* Exhibits 103-104.

⁴⁰ Research Defender, "Home," <https://researchdefender.com> (viewed 10/19/2023).

⁴¹ Research shows that providing respondents with financial incentives for completing surveys increases response rates and reduces nonresponse bias. *See, e.g.*, Diamond (2011), at p. 383; Eleanor Singer and Cong Ye (2013), "The Use and Effects of Incentives in Surveys," *The Annals of the American Academy of Political and Social Science*, Vol. 645, pp. 112-141, at p. 134; Colin F. Camerer and Robin M. Hogarth (1999), "The Effects of Financial Incentives in Experiments: A Review and Capital-Labor-Production Framework," *Journal of Risk and Uncertainty*, Vol. 19, No. 1-3, pp. 7-42.

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

- reactions (if any) to an increase in the cost of programmatic display spending, including whether and to what extent spending would be diverted to other digital advertising types;
- use of different ad buying tools for programmatic display advertising;
- metrics used to assess performance of programmatic display advertising; and
- use of experiments to inform different aspects of programmatic display advertising.

40. As noted above, the survey was designed to provide a broad review of advertisers' past decisions and behavior as well as their expected responses to changes. Thus, the survey involved a mix of questions about advertisers' considerations, past decisions, as well as questions presenting hypothetical scenarios.

B. Methodology

41. Five pre-test interviews for the Higher-Spend Advertiser Survey were conducted on September 1, 2023. No changes to the survey questionnaire were made based on these pre-test interviews. After pre-testing, the Higher-Spend Advertiser Survey was administered from September 5, 2023, to September 21, 2023. The full survey questionnaire is included in Appendix F.1. Screenshots of the survey as it appeared to respondents are presented in Appendix F.2.

1. Survey Universe and Screening Criteria

42. The survey universe for the Higher-Spend Advertiser Survey included advertisers and marketers based in the U.S. who work for companies that sell and advertise products or services (as opposed to ad agencies) and have spent over \$500,000 on advertising in the past year.⁴⁴

⁴⁴ As discussed above, because advertisers with lower spending levels may be less familiar with certain industry terminology used in the Higher-Spend Advertiser Survey, I required respondents to the Higher-Spend Advertiser

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Because a primary focus of the survey was to assess decision-making regarding programmatic display advertising specifically, the survey universe was also limited to advertisers and marketers who have used programmatic display advertising in the past year and who were personally involved in decisions regarding their company's use of display advertising, including determining strategies, budgets, use of buying tools, and/or management of digital display campaigns.

43. Upon entering the survey, respondents were asked several standard introductory and demographic questions, followed by a series of screening questions to ensure that only respondents with the relevant characteristics that define the survey universe would qualify for the main questionnaire.⁴⁵

44. First, prospective respondents who clicked on the link to the survey were asked to enter a "captcha" code presented on the screen to make sure the respondent was a person rather than a machine.

45. They were then told:

QS2. Thank you for participating in our study. Your opinions are very important to us. If you don't know an answer to a question or if you don't have an opinion, please don't guess. Simply indicate this in your response by selecting the "Don't know / Unsure" option. There are no right or wrong answers.

Your responses will be kept anonymous and will be analyzed as part of a larger sample of responses. The results of this study will not be used to try to sell you anything.

If you wear glasses or corrective lenses when using a desktop computer, laptop computer, or tablet, please wear them throughout the survey.

Survey to spend more than \$500,000 on advertising in the past year. Advertisers spending less than this amount were eligible for the Lower-Spend Advertiser Survey, which was similar to the Higher-Spend Advertiser Survey but simplified certain language.

⁴⁵ As shown in Appendix F.1, questions asked in the screening section of the questionnaire are identified by a "QS" prefix, questions asked in the main questionnaire are identified by a "Q" prefix, and the question asked in the follow-up section is identified by a "QF" prefix.

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

whether or not to use a resource, which essentially involves a choice between taking an action (use the resource) or not.^{62,63}

64. In the current survey, the question below regarding the possible diversion of spending from one type of advertising (*i.e.*, programmatic display advertising) to other types of advertising follows a similar format to other such studies involving taking action and making changes. In addition, the current survey was designed to assess the extent to which respondents would divert spending to each other type of advertising, and differences, if any, across different forms of advertising.

65. Specifically, respondents were instructed to assume a scenario in which their analysis shows that the cost of programmatic display advertising has increased by a “small but significant amount,” whereas the costs of other digital advertising types have not changed. Given this scenario, they were asked whether or not they will divert some of their spending to other types of digital advertising and if so, which types of digital advertising they will divert spending to.⁶⁴ The phrasing of this question was designed to leave it to the advertisers to consider their reaction, if any, if (what they consider to be) “a small but significant” increase in the cost of programmatic display advertising occurred.⁶⁵

⁶² See, e.g., Aram Galstyan, Shashikiran Kolar, and Kristina Lerman (2003), “Resource Allocation Games with Changing Resource Capacities,” *Proceedings of the Second International Joint Conference on Autonomous Agents and Multiagent Systems*, pp. 145-152. See also Vicki G. Morwitz, Eric Johnson, and David Schmittlein (1993), “Does Measuring Intent Change Behavior?,” *Journal of Consumer Research*, Vol. 20, No. 1, pp. 46-61.

⁶³ Other studies have also examined advertiser budgeting methods more generally. See, e.g., Douglas West and Gerard P. Prendergast (2009), “Advertising and Promotions Budgeting and The Role of Risk,” *European Journal of Marketing*, Vol. 43, No. 11/12, pp. 1457-1476.

⁶⁴ The order of the presented response options was randomized (except for “Don’t know / Unsure”).

⁶⁵ In addition, the balanced phrasing of “small but significant” avoids possible demand effects whereby respondents might have assumed that certain answers were expected or preferred. See, e.g., Itamar Simonson and Ran Kivetz (2012), “Demand Effects in Likelihood of Confusion Surveys: The Importance of Marketplace Conditions,” in *Trademark and Deceptive Advertising Surveys: Law, Science, and Design*, Chapter 11, Shari S. Diamond and Jerre B. Swann, Eds., American Bar Association, at p. 243. See also Alan G. Sawyer (1975), “Demand Artifacts in Laboratory Experiments in Consumer Research,” *Journal of Consumer Research*, Vol. 1, No. 4, pp. 20-30, at pp. 20-21.

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Q5. Please read carefully. Now suppose that, based on your analysis, the cost of programmatic display advertising has recently increased by a small but significant amount, and will remain elevated for the foreseeable future. Assume further that, based on similar analyses for other digital advertising types, the costs of other digital advertising types have not changed and are not expected to change.

So if the cost of programmatic display advertising increases (while the cost of other advertising types remains the same), will you or won't you divert some of your advertising spending for the coming year to other types of digital advertising?

- ☐ Yes, I will divert some of my advertising spending for the coming year to other types of digital advertising
- ☐ No, I will **not** divert any of my advertising spending for the coming year to other types of digital advertising [SKIP TO Q8]
- ☐ Don't know / Unsure [SKIP TO Q8]

Q6. To which other types of digital advertising below, if any, would you divert your advertising spending for the coming year as a result of the increase in the cost of programmatic display advertising?⁶⁶

To review the advertising type descriptions, hover your mouse over each digital advertising type.

*(Please select all that apply.)*⁶⁷

- ☐ Search
- ☐ Direct Deals Display
- ☐ Email
- ☐ Digital Audio
- ☐ Social
- ☐ App/In-app
- ☐ Digital Video
- ☐ Connected TV
- ☐ eCommerce Platforms
- ☐ Other
- ☐ None of the above [EXCLUSIVE] [SKIP TO Q8]
- ☐ Don't know / Unsure [EXCLUSIVE] [SKIP TO Q8]

⁶⁶ As noted above, respondents were only asked Q6 if they indicated that they would divert spending in Q5.

⁶⁷ The order of the response options was randomized (except for "Other," "None of the above," and "Don't know / Unsure").

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

66. After selecting which other digital advertising types they would divert spending to, respondents were asked to rate the extent of their increase on a scale of 0 to 10, with 0 labeled as “keep the same” and 10 labeled as “substantially increase.” Respondents were also given the option to select “Don’t know / Unsure” if they were unable to make a choice on the scale.⁶⁸

Q7. In your previous answer, you indicated that the increase in the cost of programmatic display advertising will lead you to divert some of your advertising spending to the types of digital advertising listed below.

Please use the sliders below to indicate, on a scale of **0** to **10**, the extent to which you would divert (that is, increase) advertising spending for the coming year to **each type of digital advertising** that you just indicated.

For each digital advertising type below, please select **0** if you expect to keep spending on that type of digital advertising for the coming year and **10** if you expect to substantially increase spending on that type of digital advertising.

To review the advertising type descriptions, hover your mouse over each digital advertising type.⁶⁹

Search	[INSERT SLIDER]	<input type="radio"/> Don’t know / Unsure
Direct Deals Display	[INSERT SLIDER]	<input type="radio"/> Don’t know / Unsure
Email	[INSERT SLIDER]	<input type="radio"/> Don’t know / Unsure
Digital Audio	[INSERT SLIDER]	<input type="radio"/> Don’t know / Unsure
Social	[INSERT SLIDER]	<input type="radio"/> Don’t know / Unsure
App/In-app	[INSERT SLIDER]	<input type="radio"/> Don’t know / Unsure
Digital Video	[INSERT SLIDER]	<input type="radio"/> Don’t know / Unsure
Connected TV	[INSERT SLIDER]	<input type="radio"/> Don’t know / Unsure
eCommerce Platforms	[INSERT SLIDER]	<input type="radio"/> Don’t know / Unsure
Other	[INSERT SLIDER]	<input type="radio"/> Don’t know / Unsure

67. Below is an example of how this question appeared to respondents taking the survey:⁷⁰

⁶⁸ The response options in Q7 were presented in the same order as those presented in Q6, which was randomized.

⁶⁹ As noted above, respondents were only asked Q7 if they indicated that they would divert spending in Q5.

⁷⁰ Appendix F.2, at F.2-24.

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

I and/or my business unit/team have run experiments and/or test & learn initiatives testing... *(Please select all that apply.)*⁸⁴

- ☐ Creatives
- ☐ Bid strategies
- ☐ Audiences
- ☐ Publishers
- ☐ Ad buying tool performance
- ☐ ROI/ROAS
- ☐ Other *(please specify)*: [TEXT BOX]
- ☒ Don't know / Unsure [EXCLUSIVE]

Follow-up Disclosure and Participation Question

79. At the conclusion of the survey, respondents were presented with a disclosure about the sponsor of the survey and its connection to pending antitrust lawsuits and were given the option to exclude their responses from the survey. This question was included at the end of the survey to avoid introducing any potential bias in the survey responses due to demand effects whereby respondents might have assumed that certain answers were expected or preferred.

80. Specifically, respondents were shown the following screen, which concluded the survey:⁸⁵

QF1. This survey is being conducted by consultants that have been retained on behalf of Google in connection with pending antitrust lawsuits in which the plaintiffs allege that Google engaged in anticompetitive conduct related to digital advertising.

If you are willing to participate in this survey, please click “Include my responses” below. As a reminder, your responses will be kept anonymous and will be analyzed as part of a larger sample of responses.

If you do not want to participate in this survey, please click “Exclude my responses” below.

- ☒ Include my responses
- ☒ Exclude my responses

⁸⁴ The order of the response options was randomized (except for “Don't know / Unsure”).

⁸⁵ The order of the response options was randomized.

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81. It is noteworthy that there is no reason to expect the respondents who chose, at the conclusion of the survey, to not be included in the final sample to be different from the other respondents. Considering that respondents were asked to describe their advertising practices and considerations, and they were not asked to evaluate any particular company, there is no reason to expect those who chose to not be included in the sample to be different in any systematic way or in any way that pertains to the surveys' conclusions from other respondents. In fact, some research has found that identifying the survey sponsor to respondents has no meaningful effect on the content of the survey responses.⁸⁶ For example, in this survey, one would be hard-pressed to come up with a scenario whereby those respondents who used fewer advertising buying tools would be systematically more likely to indicate that they prefer to not be included in the sample.

C. Survey Findings

82. In this section, I will summarize the main survey findings for the Higher-Spend Advertiser Survey. Additional findings can be found in Exhibits 1 to 36. The complete data set of all individual participants' responses is presented in Appendix F.3.

83. A total of 603 respondents completed the survey.⁸⁷ Of those, 94 respondents chose to exclude their responses from the survey.⁸⁸ Consistent with common practice, 7 respondents

⁸⁶ Charles Crabtree, Holger L. Kern, and Matthew T. Pietryka (2022), "Sponsorship Effects in Online Surveys," *Political Behavior*, Vol. 44, pp. 257-270; Del I. Hawkins (1979), "The Impact of Sponsor Identification and Direct Disclosure of Respondent Rights on the Quantity and Quality of Mail Survey Data," *Journal of Business*, Vol. 52, No. 4, pp. 577-590.

⁸⁷ Exhibit 1. AP removed two respondents who did not meet their internal quality control metrics. These respondents provided what AP determined to be nonsensical responses to open-ended questions, such as "R5U54U" and "The study is quite nice to carry on." These respondents were not included in the 603 respondents considered to have completed the survey.

⁸⁸ Exhibit 1. Respondents who selected "Exclude my responses" in QF1 were not included in the respondent-level data files provided to me by Advertiser Perceptions and thus I do not have access to their responses to other questions in the survey.

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

advertising, instead of up to four advertising types as was done in the Higher-Spend Advertiser Survey. Other differences involved minor updates to the phrasing of questions and answer options to make them suitable for lower-spend advertisers, such as removing references to “business unit/team” and updating “advertiser/marketer” to “products/services business.”

B. Methodology

115. Three pre-test interviews (as described above) for the Lower-Spend Advertiser Survey were conducted on September 19, 2023. No changes were made based on these pre-test interviews. The Lower-Spend Advertiser Survey was administered from September 25, 2023 to October 12, 2023. The full survey questionnaire is included in Appendix G.1. Screenshots of the survey as it appeared to respondents are presented in Appendix G.2.

1. Survey Universe and Screening Criteria

116. The survey universe for the Lower-Spend Advertiser Survey was similar to that of the Higher-Spend Advertiser Survey. Specifically, the universe for the Lower-Spend Advertiser survey included advertisers and marketers based in the U.S. who work for companies that sell and advertise products or services (as opposed to ad agencies) and have spent less than \$500,000 on advertising in the past year.¹⁴⁴ Because a primary focus of the survey was to assess decision-making regarding display advertising specifically, the survey universe was limited to advertisers and marketers who have used display advertising in the past year and who were personally involved in decisions regarding their company’s use of display advertising, including determining strategies, budgets, use of buying tools, and/or management of digital display campaigns.

¹⁴⁴ As discussed above, advertisers spending more than \$500,000 on advertising in the past year were eligible for the Higher-Spend Advertiser Survey, which used certain industry terms that higher-spend advertisers tend to be more familiar with.

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

B. Methodology

164. Four pre-test interviews for the Ad Agency Survey (as described above) were conducted on September 5, 2023. No changes were made based on the pre-testing. The actual Ad Agency Survey was administered from September 6, 2023 to September 21, 2023. The full survey questionnaire is included in Appendix H.1. Screenshots of the survey as it appeared to respondents are presented in Appendix H.2.

1. Survey Universe and Screening Criteria

165. The survey universe for the Ad Agency Survey included individuals based in the U.S. who work for ad agencies and assist their clients with media strategy (*i.e.*, advising clients on media/marketing strategies and/or how to spend advertising funds). Because a primary focus of the survey was to assess decision-making regarding programmatic display advertising specifically, the survey universe was also limited to ad agency employees who have used programmatic display advertising in the past year for their primary client and who were personally involved in assisting their primary client with decisions regarding their use of display advertising, including determining or advising the client regarding strategies, budgets, use of buying tools, and/or management of digital display campaigns.

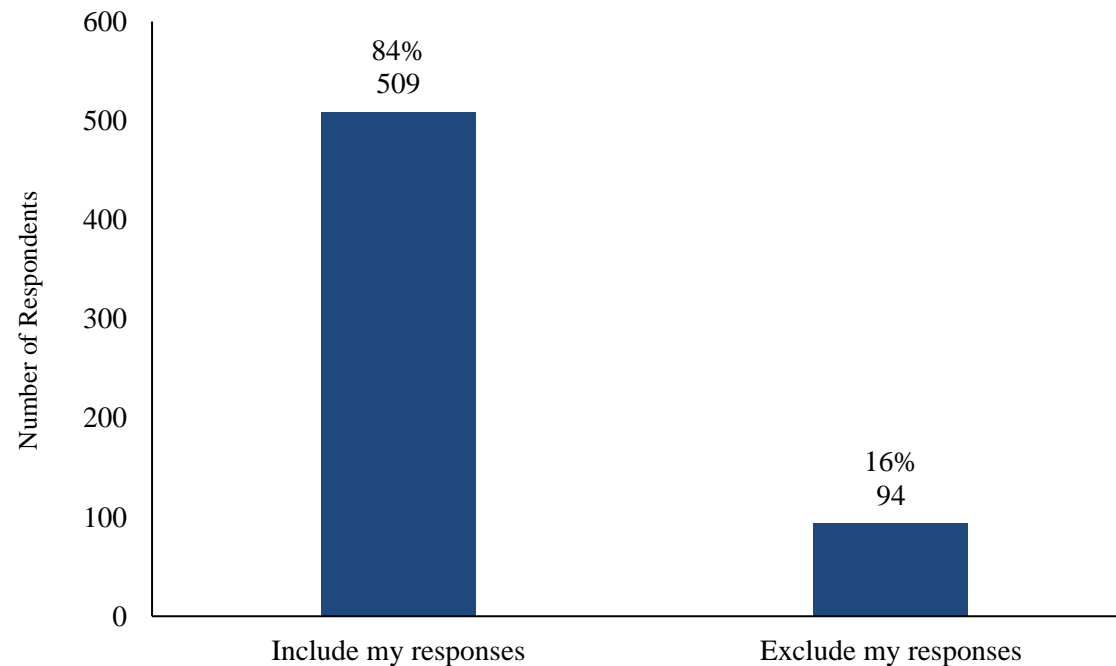
166. The screening questions used to determine whether the respondents met the definition of the relevant survey universe and thus would qualify for the main questionnaire for the Ad Agency Survey were similar to those used in the Higher-Spend Advertiser Survey, except for certain differences that I describe below.

167. Respondents were asked to select which description best characterizes their company (QS7), and had to indicate working for a media agency or a full service agency in order to proceed with the survey. If the respondent indicated working for a full service agency, they

EXHIBIT 2

HIGHER-SPEND ADVERTISER SURVEY SURVEY PARTICIPATION PREFERENCE

QF1: This survey is being conducted by consultants that have been retained on behalf of Google in connection with pending antitrust lawsuits in which the plaintiffs allege that Google engaged in anticompetitive conduct related to digital advertising. If you are willing to participate in this survey, please click “Include my responses” below. As a reminder, your responses will be kept anonymous and will be analyzed as part of a larger sample of responses. If you do not want to participate in this survey, please click “Exclude my responses” below.



Notes & Sources:

From Higher-Spend Advertiser Survey.

Includes respondents who completed the survey.

Respondents who indicated that they wanted their responses excluded from the survey were removed from the data by the panel vendor.

EXHIBIT 38

LOWER-SPEND ADVERTISER SURVEY SURVEY PARTICIPATION PREFERENCE

QF1: This survey is being conducted by consultants that have been retained on behalf of Google in connection with pending antitrust lawsuits in which the plaintiffs allege that Google engaged in anticompetitive conduct related to digital advertising. If you are willing to participate in this survey, please click “Include my responses” below. As a reminder, your responses will be kept anonymous and will be analyzed as part of a larger sample of responses. If you do not want to participate in this survey, please click “Exclude my responses” below.

Number of Respondents

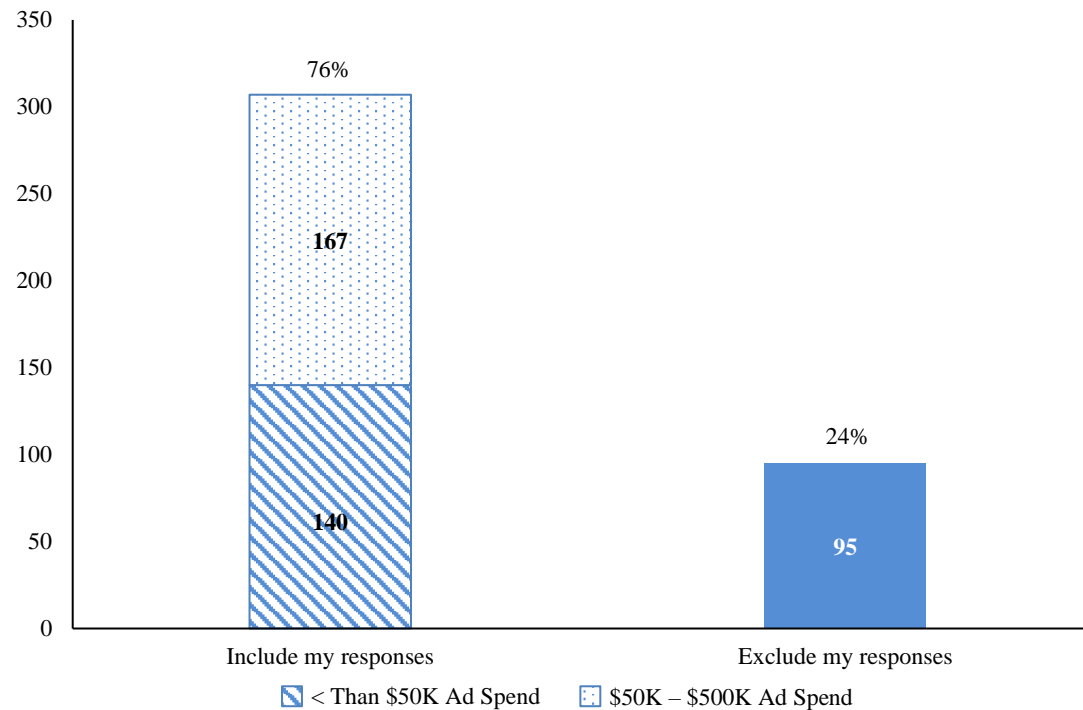


EXHIBIT 38

**LOWER-SPEND ADVERTISER SURVEY
SURVEY PARTICIPATION PREFERENCE**

Notes & Sources:

From Lower-Spend Advertiser Survey.

Includes respondents who completed the survey.

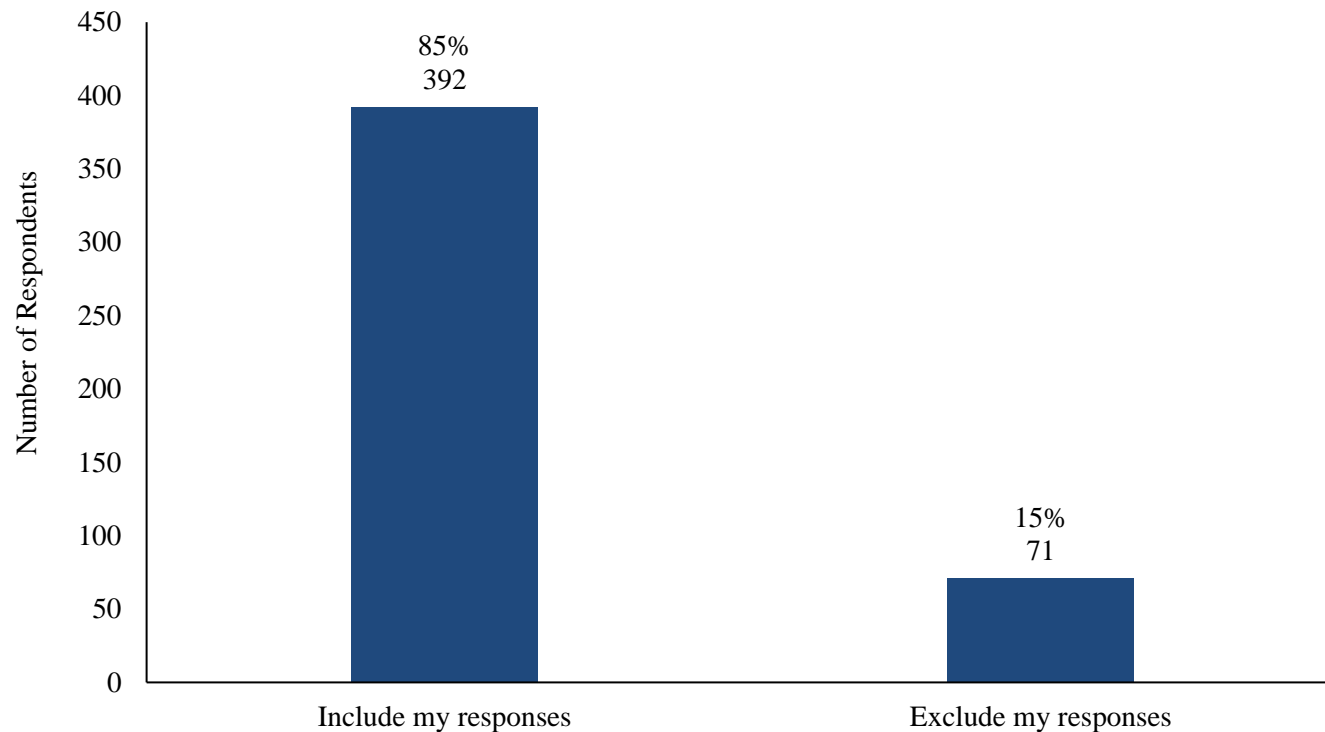
Respondents who indicated that they wanted their responses excluded from the survey were removed from the data by the panel vendor.

Information about annual ad spend for the 95 respondents who selected to exclude their responses is not available.

EXHIBIT 69

AGENCY SURVEY SURVEY PARTICIPATION PREFERENCE

QF1: This survey is being conducted by consultants that have been retained on behalf of Google in connection with pending antitrust lawsuits in which the plaintiffs allege that Google engaged in anticompetitive conduct related to digital advertising. If you are willing to participate in this survey, please click “Include my responses” below. As a reminder, your responses will be kept anonymous and will be analyzed as part of a larger sample of responses. If you do not want to participate in this survey, please click “Exclude my responses” below.



Notes & Sources:

From Agency Survey.

Includes respondents who completed the survey.

Respondents who indicated that they wanted their responses excluded from the survey were removed from the data by the panel vendor.

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APPENDIX D

PRELIMINARY INTERVIEW

GUIDE

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Preliminary Interview Guide

1. Introduction

Hello, am I speaking to [FIRST NAME]?

My name is [NAME] and I will be interviewing you. Thank you for agreeing to speak with me today.

This interview is not being recorded. I have not been told your identity, including the company you work for. I only know your job title and the industry category you work in. All information you provide will be analyzed across the entire sample of interviews.

This interview is being conducted by consultants that have been retained on behalf of Google in connection with pending antitrust lawsuits in which the plaintiffs allege that Google engaged in anticompetitive conduct related to digital advertising. Based on our research, we understand that your company is not a participant in those lawsuits. We are interviewing people who work in advertising and would like to ask you some questions about your work. Would you be willing to participate in this interview?

As we go through, please let me know if any of my questions are unclear or if I use any terms you are unfamiliar with.

I will ask you about several different topics. If I start asking about any topics that don't apply to you or your company, please just let me know and I can move on to the next topic.

When answering, please give as much detail as possible. However, if you do not know the answer, that is okay -- just let me know.

Do you have any questions before I begin?

2. General Background

1. Do you work in a particular group or area within your company? What group or area is that?
 - a. How is your advertising group organized? Does it, e.g., cover specific products, customer segments, etc.?
2. How would you describe your current role?
3. How long have you been in this role? How long have you worked on digital advertising over the course of your career?
4. In your current role, what, if any, responsibilities do you have with respect to digital advertising?
5. If you know, roughly what share or percentage of your ad spending is on digital, online advertising vs. offline advertising?
6. How would you describe the role you play in deciding how advertising dollars are spent? What are your specific responsibilities?
7. Do you work with advertising agencies for digital advertising?

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APPENDIX E PRETEST MODERATOR INSTRUCTIONS

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Pretest Moderator Instructions

Instructions: The moderator's script is highlighted in grey. Instructions and cues for the moderator are in bold and all caps.

Section 1: Introduction & Questionnaire

Hello.

My name is _____. Thank you so much for agreeing to take this survey today. Please take the survey as you normally would. There is no correct or incorrect way to take this survey, we would like you to approach this as realistically as possible. After you're done taking the survey, I will ask you a few follow-up questions.

Does that all sound okay? **[WAIT FOR AGREEMENT]**

Thank you! The link to the website you need to go to was provided in the email you received, please follow that link. **[IF NECESSARY REMIND WHO THE SENDER OF THE EMAIL WAS]** Please let me know when you have the link open.

Thank you! You can start the survey. Please let me know when you complete the survey because I will have a few follow-up questions then.

[ALLOW THE RESPONDENT TO TAKE THE SURVEY AND FINISH]

Section 2: Follow-up Questions

[QUESTIONS TO ASK AFTER THE RESPONDENT FINISHED RESPONDING TO ALL SURVEY QUESTIONS AND INDICATES SO]

Q1. Did you have any problems or difficulties while taking the survey?

Q2. Did you think any questions were unclear? If so, which ones and why?

Q3. Did you think any answer options were unclear? If so, which ones and why?

Q4. Did any questions in the survey make you feel that you should answer one way or the other? If so, which ones and why?

Q5. What do you think might be the purpose for conducting this survey? What makes you think so?

Section 3: Closing

Q6. Is there anything else you would like to say about the survey?

Thank you so much for your time. Your participation is much appreciated and a representative from Advertiser Perceptions will reach out regarding your compensation for completing this survey. Have a good day.

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APPENDIX F HIGHER-SPEND ADVERTISER SURVEY

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

APPENDIX F.1 HIGHER-SPEND ADVERTISER SURVEY SCRIPT

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**Higher-Spend Advertiser Survey
Screener and Main Survey Programmer Instructions**

LEGEND:

[PROGRAMMER NOTES IN BOLD CAPS AND BRACKETS]

Notes to respondent in italics

FORMAT: The survey consists of the following sections:

Introduction & Screening (questions labeled QS)
Main Survey Questions (questions labeled Q)
Follow-Up Questions (questions labeled QF)

Overview

[NO RESPONDENTS TO BE CONTACTED AT COMPANIES FROM THE LIST OF ENTITIES TO BE EXCLUDED]

[PANEL CONSISTS OF RESPONDENTS WHO ARE 18+, BASED IN THE U.S., AND WHOSE JOB FUNCTION RELATES TO MARKETING AND/OR ADVERTISING]

[TARGET 500 COMPLETES]

[DISABLE THE BROWSER’S “BACK” BUTTON AND DO NOT SHOW A “BACK” BUTTON WITHIN THE SURVEY]

[FORCE RESPONSES TO ANSWER ALL QUESTIONS UNLESS OTHERWISE SPECIFIED]

[DISPLAY ONE QUESTION PER PAGE UNLESS OTHERWISE SPECIFIED]

[NO SURVEY OR SECTION TITLES TO BE DISPLAYED TO RESPONDENTS]

[DIGITAL FINGERPRINTING SHOULD BE USED TO AVOID REPEAT PARTICIPATION]

[TEXT FOR TERMINATES: “THANK YOU FOR YOUR INTEREST IN OUR STUDY. YOU DO NOT QUALIFY FOR THIS STUDY. WE APPRECIATE YOUR TIME.”]

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Introduction and Screening

QS1. Please enter the code exactly as it appears in the box below, and then click “Continue” to continue.

[INSERT CAPTCHA; TERMINATE AFTER THREE INCORRECT ATTEMPTS]

QS2. Thank you for participating in our study. Your opinions are very important to us. If you don’t know an answer to a question or if you don’t have an opinion, please don’t guess. Simply indicate this in your response by selecting the “Don’t know / Unsure” option. There are no right or wrong answers.

Your responses will be kept anonymous and will be analyzed as part of a larger sample of responses. The results of this study will not be used to try to sell you anything.

If you wear glasses or corrective lenses when using a desktop computer, laptop computer, or tablet, please wear them throughout the survey.

Please do not use the “Back” button of your browser while taking the survey. When you are ready to get started, please select the “Continue” button.

QS3. What is your age? *(Please select only one option.)*

[FLIP ORDER PER RESPONDENT, AS IS AND REVERSE; KEEP “PREFER NOT TO ANSWER” LAST]

- ☐ Under 18 **[TERMINATE]**
- ☐ 18 - 34
- ☐ 35 - 49
- ☐ 50 - 64
- ☐ 65 or above
- ☐ Prefer not to answer **[TERMINATE]**

QS4. What is your gender? *(Please select only one option.)*

[RANDOMIZE; KEEP “OTHER” AND “PREFER NOT TO ANSWER” LAST]

- ☐ Male
- ☐ Female
- ☐ Other: **[INSERT TEXT BOX]**
- ☐ Prefer not to answer

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

QS5. In which state do you live? *(Please select only one option.)*

[INSERT DROP DOWN MENU OF ALL 50 STATES AND DC, PLUS “OTHER” AND “DON’T KNOW / UNSURE”]

[TERMINATE IF “OTHER” OR “DON’T KNOW / UNSURE” IS SELECTED]

QS6. Which of the following do you have any involvement in as part of your job responsibilities? *(Please select all that apply.)*

[RANDOMIZE; KEEP “OTHER” LAST]

- ☐ Hiring/HR
- ☐ IT/Tech
- ☐ Business intelligence/Data science
- ☐ Sales or account management
- ☐ Accounting/Finance
- ☐ Advertising or Marketing
- ☐ Website/Mobile App design/development
- ☐ Customer relationship management
- ☐ Data analysis/statistics
- ☐ Other *(specify)*:

[TERMINATE IF “Advertising or Marketing” IS NOT SELECTED]

QS7. Which of the following best characterizes the type of company you work for? *(Please select only one option.)*

[RANDOMIZE; KEEP “OTHER” LAST]

- Ⓐ **Advertiser/Marketer** – your company sells products or services and advertises/markets its products or services
- Ⓑ **Creative Agency** – your company designs or produces marketing content and/or advises clients on their creative media/marketing strategies **[TERMINATE]**
- Ⓒ **Media Agency** – your company advises clients on their media/marketing strategies and/or how to spend their advertising funds **[TERMINATE]**
- Ⓓ **Full Service Agency** – your company handles both Creative and Media strategy and/or execution **[TERMINATE]**
- Ⓔ **Other** *(please describe)*: **[INSERT TEXT BOX] [TERMINATE]**

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

QS8. Which of the following, if any, best characterizes the market sector/industry your company is in? *(Please select only one option.)*

[DO NOT RANDOMIZE]

- ☐ Advertising or Marketing
- ☐ Apparel/Fashion
- ☐ Automotive
- ☐ B2B/Services for Businesses
- ☐ Consumer Electronics
- ☐ Education
- ☐ Financial Products/Services for Consumers (including Fintech)
- ☐ Food and Beverage
- ☐ Government
- ☐ Health and Beauty Products
- ☐ Home Products/Appliances
- ☐ Health Care or Medical Services
- ☐ Media and Entertainment
- ☐ Non-Profit
- ☐ Pharmaceuticals and Remedies (Rx or OTC)
- ☐ Restaurants
- ☐ Retail (including Ecommerce)
- ☐ Telecommunications
- ☐ Travel and Hospitality
- ☐ Other *(Please describe)*: **[INSERT TEXT BOX]**

QS9. Which of the following best characterizes your current job title/level? *(Please select only one option.)*

[RANDOMIZE; KEEP “OTHER” LAST]

- ☐ C-Level (CEO, COO, CMO, etc.)
- ☐ Vice President, SVP, EVP, President, etc.
- ☐ Director
- ☐ Supervisor/Department Head/Group Manager
- ☐ Manager
- ☐ Strategist
- ☐ Associate
- ☐ Analyst
- ☐ Buyer
- ☐ Planner
- ☐ Other *(please describe)*: **[INSERT TEXT BOX]**

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

QS10. Approximately how much did your company spend in the last 12 months on all advertising, including all digital types (e.g., display, video, audio, social) plus all nondigital types (e.g., TV types, print, OOH, etc.)? *(Please select only one option.)*

[FLIP ORDER PER RESPONDENT, AS IS AND REVERSE; KEEP “DON’T KNOW / UNSURE” LAST]

- ☐ Less than \$10,000 [TERMINATE]
- ☐ \$10,000 to less than \$50,000 [TERMINATE]
- ☐ \$50,000 to less than \$100,000 [TERMINATE]
- ☐ \$100,000 to less than \$250,000 [TERMINATE]
- ☐ \$250,000 to less than \$500,000 [TERMINATE]
- ☐ \$500,000 to less than \$1 million
- ☐ \$1 million to less than \$3 million
- ☐ \$3 million to less than \$7 million
- ☐ \$7 million to less than \$15 million
- ☐ \$15 million to less than \$30 million
- ☐ \$30 million to less than \$50 million
- ☐ \$50 million to less than \$100 million
- ☐ \$100 million to less than \$250 million
- ☐ \$250 million to less than \$500 million
- ☐ \$500 million or more
- ☐ Don’t know / Unsure [TERMINATE]

QS11. Please think about your business unit/team’s total advertising budget. In the past year, what percentage of your business unit/team’s total advertising budget was used for **digital (online) advertising**, as opposed to **offline advertising**? Please give your best estimate. *(Please enter a number from 0 to 100 for each type of advertising, or select “Don’t know / Unsure.” Values must add up to 100%)*

[FOR ERRORS, DISPLAY THE FOLLOWING ERROR MESSAGE: “Please enter a whole number between 0 and 100 for each advertising type, or select “Don’t know / Unsure.” Values must add up to 100.”][SHOW TOTAL AT BOTTOM]

[RANDOMIZE ORDER; KEEP “DON’T KNOW / UNSURE” LAST]

Percentage of budget spent on **digital (online) advertising** last year:

Percentage of budget spent on **offline advertising** last year:

TOTAL **[SHOW SUM OF NUMBERS ABOVE]**

- ☐ Don’t know / Unsure [EXCLUSIVE]

[TERMINATE IF DIGITAL (ONLINE) = 0]

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

QS12. Which of the following types of **digital advertising**, if any, has your business unit/team used in the past year? Please review the description of each advertising type **carefully**.
(Please select all that apply.)

[RANDOMIZE ORDER; KEEP “OTHER” AND “DON’T KNOW / UNSURE” LAST]

	Advertising Type	Description
<input type="checkbox"/>	Search	Digital ads placed on search engine result pages. Ads generally consist of a headline, description, and a link to the destination URL.
<input type="checkbox"/>	Display	Digital ads made up of text, image, video, and/or other multimedia components that typically appear along the top or sides of a website, or sometimes in the middle of other content on a website. Examples of display ad formats include banner ads, animations, and interactive content. Display ads do not include ads placed on social media platforms.
<input type="checkbox"/>	Email	Digital ads sent via email to current and potential customers.
<input type="checkbox"/>	Digital Audio	Recorded advertisements that play between or during songs, podcasts, or other digital audio content.
<input type="checkbox"/>	Social	Digital ads placed on social media platforms such as Facebook, Instagram, LinkedIn, Snapchat, and Twitter.
<input type="checkbox"/>	App/In-App	Digital ads placed and displayed within mobile apps. Does not include ads placed on social media platforms.
<input type="checkbox"/>	Digital Video	Includes video ads that appear before, during, or after digital content in a video player, such as YouTube.
<input type="checkbox"/>	Connected TV	Includes digital advertising that appears on home screens of CTV devices and in-stream video ads that appear on CTVs from platforms like Hulu, Roku and YouTube. CTVs are TV sets connected to the internet through built-in internet capability or through another device such as a Blu-ray player, game console, set-top box (e.g., Apple TV, Google Chromecast, Roku), etc.
<input type="checkbox"/>	eCommerce Platforms	Digital ads that appear on eCommerce platforms, such as Amazon.com or Instacart.
<input type="checkbox"/>	Other (specify and explain): [INSERT TEXT BOX]	
<input checked="" type="radio"/> Don't know / Unsure [EXCLUSIVE]		

[TERMINATE IF “DISPLAY” IS NOT SELECTED]

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

QS13. You indicated that your business unit/team has used **display advertising** in the past year. Display ad inventory can be purchased through programmatic transaction methods or through direct deals with publishers. Please review the below descriptions about these transaction methods.

Programmatic: Ads that are purchased programmatically are transacted and fulfilled using automation. In programmatic transactions, the price of each impression is typically determined in an auction conducted automatically before the impression is served.

Direct Deals: Ads that are purchased through a direct negotiation, or “direct deal,” with the publisher. In direct deals, the price of the ad inventory is typically set through a one-to-one negotiation between the advertiser and the publisher rather than through an auction. “Direct deals” include programmatic direct deals, such as programmatic guaranteed deals and preferred deals.

Which of the following transaction methods has your business unit/team (or your ad agency) used to purchase **display ad inventory** in the past year? *(Please select all that apply.)*

[RANDOMIZE ORDER; KEEP “NONE OF THE ABOVE” AND “DON’T KNOW / UNSURE” LAST]

- ☐ Programmatic
- ☐ Direct Deals
- ☐ None of the above [EXCLUSIVE]
- ☐ Don’t know / Unsure [EXCLUSIVE]

[TERMINATE IF “PROGRAMMATIC” IS NOT SELECTED]

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

QS14. **[IF “SOCIAL” IS SELECTED IN QS12]** You indicated that your business unit/team has used **social advertising** in the past year. Which of the following social media platforms, if any, has your business unit/team advertised on in the past year? (*Please select all that apply.*)

[RANDOMIZE ORDER; KEEP “OTHER,” “NONE OF THE ABOVE”, AND “DON’T KNOW / UNSURE” LAST]

- ☐ Facebook
- ☐ Instagram
- ☐ Pinterest
- ☐ Snapchat
- ☐ TikTok
- ☐ Twitter
- ☐ LinkedIn
- ☐ Reddit
- ☐ Tumblr
- ☐ FriendLinx
- ☐ Other social media platforms (*specify*): **[INSERT TEXT BOX]**
- ☒ None of the above **[EXCLUSIVE]**
- ☒ Don’t know / Unsure **[EXCLUSIVE]**

QS15. In which of the following ways have you personally been involved in your company’s **digital display** advertising efforts in the **last 12 months**? (*Please select all that apply.*)

[RANDOMIZE; KEEP “NONE OF THE ABOVE” AND “DON’T KNOW / UNSURE” LAST]

- ☐ I determine overall strategies and/or budgets for digital display
- ☐ I determine which buying tools and/or demand-side platforms (DSPs) to use for digital display
- ☐ I regularly use self-serve ad platforms to manage digital display campaigns
- ☐ I oversee a team/individuals that use(s) self-serve ad platforms to manage digital display campaigns
- ☐ I regularly set up audience/target parameters for programmatic digital display buying
- ☐ I oversee a team/individuals that set(s) up audience/target parameters for programmatic digital display buying
- ☐ I measure results of digital display campaigns
- ☐ I oversee a team/individuals that measure(s) results of digital display campaigns
- ☒ None of the above **[EXCLUSIVE] [TERMINATE]**
- ☒ Don’t know / Unsure **[EXCLUSIVE] [TERMINATE]**

[TERMINATE IF NONE OF “I determine overall strategies and/or budgets for digital display”, “I determine which buying tools and/or demand-side platforms (DSPs) to use for digital display”, “I regularly use self-serve ad platforms to manage digital display campaigns”, “I oversee a team/individuals that use(s) self-serve ad platforms to manage digital display campaigns” ARE SELECTED]

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

QS16. This question is testing whether or not you're paying attention while taking this survey.
Please select "Somewhat likely" below. (*Please select only one option.*)

[FLIP ORDER PER RESPONDENT, AS IS AND REVERSE; KEEP "DON'T KNOW / UNSURE" LAST]

- ☐ Not at all likely [TERMINATE]
- ☐ Not likely [TERMINATE]
- ☐ Neither unlikely nor likely [TERMINATE]
- ☐ Somewhat likely
- ☐ Very likely [TERMINATE]
- ☐ Don't know / Unsure [TERMINATE]

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Main Questionnaire

- Q1. You have been selected to answer questions about advertising practices used by your business unit, or the team you work on. For each question, if you don't know or are unsure, please don't guess. Simply indicate this in your response by selecting the "Don't know / Unsure" option. There are no right or wrong answers.

Also, you should complete this survey without stopping in the middle. Please make sure not to consult anyone; use your browser's "Back" button; or open another browser while working on this survey.

Use of Ad Agencies

- Q2. Do you or do you not use an ad agency for digital advertising? *(Please select one option.)*

[FLIP ORDER PER RESPONDENT, AS IS AND REVERSE; KEEP "DON'T KNOW / UNSURE" LAST]

- ☐ Yes, I use an ad agency for digital advertising
- ☐ No, I do **not** use an ad agency for digital advertising
- ☐ Don't know / Unsure

- Q3. **[IF RESPONDENT SELECTED "YES" IN Q2]** For which, if any, of the following do you use an ad agency? *(Please select all that apply.)*

[RANDOMIZE ORDER; KEEP "OTHER," "NONE OF THE ABOVE," AND "DON'T KNOW / UNSURE" LAST]

- ☐ Content and/or creatives
- ☐ Consulting services
- ☐ Media/marketing strategies
- ☐ Allocating advertising funds across advertising types
- ☐ Budgeting decisions
- ☐ Customer research
- ☐ Implementation of advertising (e.g., placing bids, interacting with DSPs)
- ☐ Tracking advertising performance
- ☐ Inventory access
- ☐ Running advertising tests/experiments
- ☐ Other *(specify)*: **[INSERT TEXT BOX]**
- ☐ None of the above **[EXCLUSIVE]**
- ☐ Don't know / Unsure **[EXCLUSIVE]**

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Budget Allocation and Substitution

Q4. The following questions pertain to **digital advertising**.

Previously, you mentioned that your business unit/team has used the following types of **digital advertising** in the past year. What is your best estimate of the share of your business unit/team's **digital advertising** budget that was used for each of these types of advertising in the past year? Specifically, please allocate 100% across the different types of digital advertising shown below based on the share of your total digital advertising budget spent on each type. The total should add up to 100%.

To review the advertising type descriptions, hover your mouse over each digital advertising type.

(Please enter a number from 0 to 100 in each cell, or select "Don't know / Unsure." Please make sure that numbers add up to 100.)

[SHOW ALL ANSWER OPTIONS SELECTED IN QS12 AND QS13 WITH TEXT BOX REQUIRING WHOLE NUMBER BETWEEN 0 AND 100. RANDOMIZE ORDER; KEEP "OTHER" AND "DON'T KNOW / UNSURE" LAST. SHOW RUNNING TOTAL AT THE BOTTOM OF THE PAGE WITH THE SUM OF THE NUMBERS ENTERED]

[DISPLAY DESCRIPTIONS FROM QS12 AND QS13 WHEN RESPONDENT HOVERS OVER TYPE OF ADVERTISING]

[THE SUM OF ALL NUMBERS MUST EQUAL 100. IF RESPONDENT CLICKS "NEXT" AND THE SUM OF THE NUMBERS IS NOT EQUAL TO 100, SHOW THE FOLLOWING ERROR MESSAGE: "Sorry, your answers do not add up to 100. Please try again."]

[FOR ALL OTHER ERRORS, DISPLAY THE FOLLOWING ERROR MESSAGE: "Please specify a whole number in each cell, and do not leave any cell blank. Please enter 0 if you do not spend any portion of your advertising budget on a type of advertising."]

Search:	<input type="text"/>
Programmatic Display:	<input type="text"/>
Direct Deals Display:	<input type="text"/>
Email:	<input type="text"/>
Digital Audio:	<input type="text"/>
Social:	<input type="text"/>
App/In-app:	<input type="text"/>
Digital Video:	<input type="text"/>
Connected TV:	<input type="text"/>

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eCommerce Platforms:

Other

TOTAL

**[SHOW SUM OF NUMBERS
ABOVE]**

☉ Don't know / Unsure **[EXCLUSIVE]**

- Q5. Please read carefully. Now suppose that, based on your analysis, the cost of **programmatic display advertising** has **recently increased by a small but significant amount, and will remain elevated for the foreseeable future.** Assume further that, based on similar analyses for other digital advertising types, the **costs of other digital advertising types** have **not** changed and are not expected to change.

So if the cost of programmatic display advertising increases (while the cost of other advertising types remains the same), will you or won't you divert some of your advertising spending for the coming year to other types of digital advertising?

[FLIP ORDER PER RESPONDENT, AS IS AND REVERSE; KEEP “DON'T KNOW / UNSURE” LAST]

- ☉ Yes, I will divert some of my advertising spending for the coming year to other types of digital advertising.
 - ☉ No, I will **not** divert any of my advertising spending for the coming year to other types of digital advertising. **[SKIP TO Q8]**
 - ☉ Don't know / Unsure **[SKIP TO Q8]**
- Q6. To which other types of digital advertising below, if any, would you divert your advertising spending for the coming year as a result of the **increase in the cost of programmatic display advertising**?

To review the advertising type descriptions, hover your mouse over each digital advertising type.

(Please select all that apply.)

[DISPLAY DESCRIPTIONS FROM QS12 AND QS13 WHEN RESPONDENT HOVERS OVER TYPE OF ADVERTISING. RANDOMIZE ORDER; KEEP “OTHER,” “NONE OF THE ABOVE,” AND “DON'T KNOW / UNSURE” LAST.]

- ☐ Search
- ☐ Direct Deals Display
- ☐ Email
- ☐ Digital Audio
- ☐ Social
- ☐ App/In-App
- ☐ Digital Video

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

- ☐ Connected TV
- ☐ eCommerce Platforms
- ☐ Other
- ☒ None of the above [EXCLUSIVE] [SKIP TO Q8]
- ☒ Don't know / Unsure [EXCLUSIVE] [SKIP TO Q8]

Q7. In your previous answer, you indicated that the increase in the cost of programmatic display advertising will lead you to divert some of your advertising spending to the types of digital advertising listed below.

Please use the sliders below to indicate, on a scale of **0** to **10**, the extent to which you would divert (that is, increase) advertising spending for the coming year to **each type of digital advertising** that you just indicated.

For each digital advertising type below, please select **0** if you expect to keep spending on that type of digital advertising for the coming year and **10** if you expect to substantially increase spending on that type of digital advertising.

To review the advertising type descriptions, hover your mouse over each digital advertising type.

[SHOW ANSWER OPTIONS SELECTED IN Q6. MATCH ORDER OF RESPONSES TO Q6. FOR EACH ADVERTISING TYPE, SHOW SLIDER FROM 0 TO 10, LABEL 0 “KEEP THE SAME” AND 10 “SUBSTANTIALLY INCREASE.” INCLUDE OPTION FOR “DON’T KNOW / UNSURE”.]

[DISPLAY DESCRIPTIONS FROM QS12 AND QS13 WHEN RESPONDENT HOVERS OVER TYPE OF ADVERTISING]

Search	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure
Direct Deals Display	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure
Email	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure
Digital Audio	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure
Social	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure
App/In-app	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure
Digital Video	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure
Connected TV	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure
eCommerce Platforms	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure
Other	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Use of Ad Buying Tools for Programmatic Display (Multihoming)

Q8. An ad buying tool is a programmatic advertising platform that allows advertisers and media buying agencies to bid automatically on display ad inventory from a wide range of publishers. Some ad buying tools can also be used to buy video and search ad inventory. Ad buying tools include demand side platforms, or “DSPs.”

Which of the following ad buying tools, if any, have you and/or your business unit/team used during the **past year** for **programmatic display advertising**? (*Please select all that apply.*)

[RANDOMIZE ORDER; KEEP “OTHER” AND “DON’T KNOW / UNSURE” LAST]

- ☐ Google Ads
- ☐ Google Display and Video 360 (DV360)
- ☐ illumin (formerly AcuityAds)
- ☐ Adelphic
- ☐ Adform
- ☐ Adobe Advertising Cloud
- ☐ Amazon DSP
- ☐ Amobee
- ☐ Basis by Centro
- ☐ Beeswax
- ☐ Criteo
- ☐ MediaMath DSP
- ☐ Outbrain
- ☐ Quantcast
- ☐ Simpli.fi
- ☐ StackAdapt
- ☐ Taboola
- ☐ The Trade Desk DSP
- ☐ Yahoo DSP (formerly Verizon Media DSP)
- ☐ Xandr Invest
- ☐ Zeta Global
- ☐ Quorexx
- ☐ Ad Step Technologies
- ☐ Other (*please specify*): [TEXT BOX]
- ☒ Don’t know / Unsure [EXCLUSIVE] [SKIP TO Q17]

[ADD FOLLOWING TEXT AS HOVER OVER FOR ALL INSTANCES OF “AD BUYING TOOL” IN FOLLOWING QUESTIONS: An ad buying tool is a programmatic advertising platform that allows advertisers and media buying agencies to bid automatically on display ad inventory from a wide range of publishers. Some ad buying tools can also be used to buy video and search ad inventory Ad buying tools include demand side platforms, or “DSPs.”.]

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

- Q9. **[IF MORE THAN ONE AD BUYING TOOL IS SELECTED IN Q8]** Why did you and/or your business unit/team use more than one ad buying tool for **programmatic display advertising** in the past year? *(Please type in your response, or select “Don’t know / Unsure”.)*

[INSERT TEXT BOX]

[REQUIRE AT LEAST 4 CHARACTERS; IF ENTRY IS LESS THAN 4 CHARACTERS, SHOW ERROR “Please be thorough in your response.”]

☐ Don’t know / Unsure **[EXCLUSIVE]**

- Q10. Do you and/or your business unit/team expect to use the same number, more, or fewer ad buying tools for **programmatic display advertising** next year? *(Please select only one option.)*

[RANDOMIZE ORDER; KEEP “DON’T KNOW / UNSURE” LAST]

- ☐ I expect to use **more** ad buying tools for programmatic display advertising next year.
- ☐ I expect to use **fewer** ad buying tools for programmatic display advertising next year.
- ☐ I expect to use the **same number** of ad buying tools for programmatic display advertising next year.
- ☐ Don’t know / Unsure

- Q11. **[IF MORE OR FEWER IS SELECTED IN Q10]** You indicated that, compared to the past year, you expect to use **[PIPE IN BASED ON ANSWER IN Q10: “more” or “fewer”]** ad buying tools for programmatic display advertising next year. Why do you and/or your business unit/team expect to use **[PIPE IN BASED ON ANSWER IN Q10: “more” or “fewer”]** ad buying tools for programmatic display advertising next year? *(Please type in your response, or select “Don’t know / Unsure”.)*

[INSERT TEXT BOX]

[REQUIRE AT LEAST 4 CHARACTERS; IF ENTRY IS LESS THAN 4 CHARACTERS, SHOW ERROR “Please be thorough in your response.”]

☐ Don’t know / Unsure **[EXCLUSIVE]**

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Q12. Which of the following factors, if any, do you and/or your business unit/team consider when deciding to use a particular ad buying tool for **programmatic display advertising**? *(Please select all that apply.)*

[RANDOMIZE ORDER; KEEP “OTHER” AND “DON’T KNOW / UNSURE” LAST]

- ☐ Ad placement effectiveness
- ☐ Audience scale / Reach
- ☐ Ease of use / User interface
- ☐ Targeting criteria and capabilities
- ☐ Reporting features
- ☐ Forecasting tools
- ☐ Budget management tools
- ☐ API and integrations
- ☐ Troubleshooting capabilities
- ☐ Media optimization of placements during a campaign
- ☐ Brand safety / fraud protection
- ☐ Identity management
- ☐ Support
- ☐ Cost
- ☐ Other *(please specify)*: **[TEXT BOX]**
- ☒ Don’t know / Unsure **[EXCLUSIVE]**

Q13. Have you and/or your business unit/team stopped using any ad buying tool(s) for **programmatic display advertising** in the **past year**? *(Please select only one option.)*

[RANDOMIZE ORDER; KEEP “DON’T KNOW / UNSURE” LAST]

- ☒ Yes, I and/or my business unit/team stopped using at least one ad buying tool in the past year.
- ☒ No, I and/or my business unit/team have **not** stopped using any ad buying tools in the past year. **[SKIP TO Q15]**
- ☒ Don’t know / Unsure **[SKIP TO Q15]**

Q14. **[IF YES IN Q13]** You indicated that you and/or your business unit/team stopped using at least one ad buying tool in the **past year** for **programmatic display advertising**. What factors led you and/or your business unit/team to stop using one or more ad buying tools for **programmatic display advertising**? *(Please type your response in the text box below, or select “Don’t know / Unsure”.)*

[INSERT TEXT BOX]

[REQUIRE AT LEAST 4 CHARACTERS; IF ENTRY IS LESS THAN 4 CHARACTERS, SHOW ERROR “Please be thorough in your response.”]

- ☒ Don’t know / Unsure **[EXCLUSIVE]**

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Q15. Have you and/or your business unit/team started using any ad buying tool(s) in the **past year** for **programmatic display advertising**? *(Please select only one option.)*
[RANDOMIZE ORDER; KEEP “DON’T KNOW / UNSURE” LAST]

- ☐ Yes, I and/or my business unit/team started using at least one ad buying tool in the past year.
- ☐ No, I and/or my business unit/team have **not** started using any ad buying tools in the past year.
- ☐ Don’t know / Unsure

Q16. **[IF YES IN Q15]** You indicated that you and/or your business unit/team started using at least one ad buying tool in the **past year** for **programmatic display advertising**. What factors led you and/or your business unit/team to start using one or more ad buying tools for **programmatic display advertising**? *(Please type your response in the text box below, or select “Don’t know / Unsure”).*

[INSERT TEXT BOX]

[REQUIRE AT LEAST 4 CHARACTERS; IF ENTRY IS LESS THAN 4 CHARACTERS, SHOW ERROR “Please be thorough in your response.”]

- ☐ Don’t know / Unsure **[EXCLUSIVE]**

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Measuring Performance

Q17. [ONLY INCLUDE ADVERTISING TYPES SELECTED IN QS12 AND QS13] Which of the following metrics, if any, are you and/or your business unit/team using to assess the performance of **programmatic display ads**, **direct deals display ads**, **social media ads**, and/or **digital video ads**?

To review the advertising type descriptions, hover your mouse over each digital advertising type. *(Please select all that apply in each column.)*

[DISPLAY DESCRIPTIONS FROM QS12 WHEN RESPONDENT HOVERS OVER TYPE OF ADVERTISING]

[RANDOMIZE ORDER OF ROWS; KEEP “OTHER,” “NONE OF THE ABOVE,” AND “DON’T KNOW / UNSURE” LAST. RANDOMIZE ORDER OF COLUMNS]

Metric	Programmatic display ads	Direct deals display ads	Social media ads	Digital video ads
Impressions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clicks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conversions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost per impression (CPM)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost per click (CPC)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost per action (CPA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Return on Ad Spend (ROAS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Return on Investment (ROI)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Click through rate (CTR)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other <i>(please specify)</i> : [TEXT BOX]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
None of the above [EXCLUSIVE]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Don’t know / Unsure [EXCLUSIVE]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q18. [ONLY IF MORE THAN ONE METRIC FOR PROGRAMMATIC DISPLAY ADS ARE SELECTED IN Q17] You indicated that you and/or your business unit/team use the following metrics to assess the performance of **programmatic display ads**. Please rank these metrics in terms of **how important they are to accurately assessing the performance of programmatic display ads**, with 1 being the most important and [NUMBER OF MEASURES SELECTED IN Q17] being the least important. *(Please rank the following metrics, or select “Don’t know / Unsure”).*

[HAVE RESPONDENTS ASSIGN A RANK FROM 1 TO THE NUMBER OF RESPONSES SELECTED IN Q17 FOR EACH PERFORMANCE METRIC]

☐ Don’t know / Unsure [EXCLUSIVE]

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Q19. How often, if at all, do you and/or your business unit/team measure or assess the performance of your **programmatic display advertising**? *(Please select only one option.)*

If you are using an ad agency and they are responsible for measuring or assessing performance of your programmatic display advertising, please indicate how often you receive information about the performance of your programmatic display advertising from the agency.

[RANDOMIZE ORDER AS IS AND REVERSE; KEEP “DON’T KNOW / UNSURE” LAST]

- ☐ Daily
- ☐ Weekly
- ☐ Monthly
- ☐ Quarterly
- ☐ Annually
- ☐ Don’t know / Unsure

Q20. In the past year, have you and/or your business unit/team run any experimental or test & learn initiatives on your **programmatic display ads**? *(Please select only one option.)*

[RANDOMIZE ORDER AS IS AND REVERSE; KEEP “DON’T KNOW / UNSURE” LAST]

- ☐ Yes
- ☐ No **[SKIP TO QF1]**
- ☐ Don’t know / Unsure **[SKIP TO QF1]**

Q21. Which of the following types of experiments or test & learn initiatives, if any, have you and/or your business unit/team run in the past year on your **programmatic display ads**?

I and/or my business unit/team have run experiments and/or test & learn initiatives testing... *(Please select all that apply.)*

[RANDOMIZE ORDER; KEEP “OTHER” AND “DON’T KNOW / UNSURE” LAST]

- ☐ Creatives
- ☐ Bid strategies
- ☐ Audiences
- ☐ Publishers
- ☐ Ad buying tool performance
- ☐ ROI/ROAS
- ☐ Other *(please specify)*: **[TEXT BOX]**
- ☐ Don’t know / Unsure **[EXCLUSIVE]**

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Follow Up Question

QF1. This survey is being conducted by consultants that have been retained on behalf of Google in connection with pending antitrust lawsuits in which the plaintiffs allege that Google engaged in anticompetitive conduct related to digital advertising.

If you are willing to participate in this survey, please click “Include my responses” below. As a reminder, your responses will be kept anonymous and will be analyzed as part of a larger sample of responses.

If you do not want to participate in this survey, please click “Exclude my responses” below.

[RANDOMIZE ORDER]

- ☐ Include my responses
- ☐ Exclude my responses

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

APPENDIX F.2 HIGHER-SPEND ADVERTISER SURVEY SCREENSHOTS

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

INTRODUCTION AND SCREENING



0%

Please enter the code exactly as it appears in the box below, and then click “Continue” to continue.

ONEYRK

Continue »

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3%

Thank you for participating in our study. Your opinions are very important to us. If you don't know an answer to a question or if you don't have an opinion, please don't guess. Simply indicate this in your response by selecting the "Don't know/Unsure" option. There are no right or wrong answers.

Your responses will be kept anonymous and will be analyzed as part of a larger sample of responses. The results of this study will not be used to try to sell you anything.

If you wear glasses or corrective lenses when using a desktop computer, laptop computer, or tablet, please wear them throughout the survey.

Please do not use the "Back" button of your browser while taking the survey. When you are ready to get started, please select the "Continue" button.

Continue »

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6%


What is your age?

(Please select only one option.)

- ☐ 65 or above
- ☐ 50 – 64
- ☐ 35 – 49
- ☐ 18 – 34
- ☐ Under 18
- ☐ Prefer not to answer

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



9%

What is your gender?
(Please select only one option.)

☐ Female


☐ Male

☐ Other:

☐ Prefer not to answer

Continue »

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13%

In which state do you live?
(Please select only one option.)

Select one... ▼

Continue »

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16%

Which of the following do you have any involvement in as part of your job responsibilities?

(Please select all that apply.)

- ☐ Customer relationship management
- ☐ Hiring/HR
- ☐ Data analysis/statistics
- ☐ Business intelligence/Data science
- ☐ Website/Mobile App design/development
- ☐ Advertising or Marketing
- ☐ Accounting/Finance
- ☐ Sales or account management
- ☐ IT/Tech
- ☐ Other *(specify):*

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



19%


Which of the following best characterizes the type of company you work for?

(Please select only one option.)

- ☐ **Full Service Agency** – your company handles both Creative and Media strategy and/or execution
- ☐ **Creative Agency** – your company designs or produces marketing content and/or advises clients on their creative media/marketing strategies
- ☐ **Media Agency** – your company advises clients on their media/marketing strategies and/or how to spend their advertising funds
- ☐ **Advertiser/Marketer** – your company sells products or services and advertises/markets its products or services
- ☐ **Other** *(please describe):*

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



22%

Which of the following, if any, best characterizes the market sector/industry your company is in?
(Please select only one option.)

☐ Advertising or Marketing

☐ Apparel/Fashion

☐ Automotive

☐ B2B/Services for Businesses

☐ Consumer Electronics

☐ Education

☐ Financial Products/Services for Consumers (including Fintech)

☐ Food and Beverage

☐ Government

☐ Health and Beauty Products

☐ Home Products/Appliances

☐ Health Care or Medical Services

☐ Media and Entertainment

☐ Non-Profit

☐ Pharmaceuticals and Remedies (Rx or OTC)

☐ Restaurants

☐ Retail (including Ecommerce)

☐ Telecommunications

☐ Travel and Hospitality

☐ Other *(Please describe):*

Continue »

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26%

Which of the following best characterizes your current job title/level?

(Please select only one option.)

- ☐ Director
- ☐ Planner
- ☐ Manager
- ☐ Associate
- ☐ Strategist
- ☐ Buyer
- ☐ C-Level (CEO, COO, CMO, etc.)
- ☐ Supervisor/Department Head/Group Manager
- ☐ Vice President, SVP, EVP, President, etc.
- ☐ Analyst
- ☐ Other *(please describe)*:

Continue »

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29%

Approximately how much did your company spend in the last 12 months on all advertising, including all digital types (e.g., display, video, audio, social) plus all non-digital types (e.g., TV types, print, OOH, etc.)?

(Please select only one option.)

- ☐ \$500 million or more
- ☐ \$250 million to less than \$500 million
- ☐ \$100 million to less than \$250 million
- ☐ \$50 million to less than \$100 million
- ☐ \$30 million to less than \$50 million
- ☐ \$15 million to less than \$30 million
- ☐ \$7 million to less than \$15 million
- ☐ \$3 million to less than \$7 million
- ☐ \$1 million to less than \$3 million
- ☐ \$500,000 to less than \$1 million
- ☐ \$250,000 to less than \$500,000
- ☐ \$100,000 to less than \$250,000
- ☐ \$50,000 to less than \$100,000
- ☐ \$10,000 to less than \$50,000
- ☐ Less than \$10,000
- ☐ Don't know/Unsure

Continue »

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32%

Please think about your business unit/team's total advertising budget. In the past year, what percentage of your business unit/team's total advertising budget was used for **digital (online) advertising**, as opposed to **offline advertising**? Please give your best estimate.

(Please enter a number from 0 to 100 for each type of advertising or select "Don't know/Unsure." Values must add up to 100%)

Percentage of budget spent on offline advertising last year:	<input type="text"/> %
Percentage of budget spent on digital (online) advertising last year:	<input type="text"/> %
Don't know/Unsure	<input type="checkbox"/>
Total: 0 %	

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



35%

Which of the following types of **digital advertising**, if any, has your business unit/team used in the past year? Please review the description of each advertising type **carefully**.

(Please select all that apply.)

- ☐ **Social** (Digital ads placed on social media platforms such as Facebook, Instagram, LinkedIn, Snapchat, and Twitter.)
- ☐ **Search** (Digital ads placed on search engine result pages. Ads generally consist of a headline, description, and a link to the destination URL.)
- ☐ **Digital Audio** (Recorded advertisements that play between or during songs, podcasts, or other digital audio content.)
- ☐ **Email** (Digital ads sent via email to current and potential customers.)
- ☐ **Display** (Digital ads made up of text, image, video, and/or other multimedia components that typically appear along the top or sides of a website, or sometimes in the middle of other content on a website. Examples of display ad formats include banner ads, animations, and interactive content. Display ads do not include ads placed on social media platforms.)
- ☐ **App/In-App** (Digital ads placed and displayed within mobile apps. Does not include ads placed on social media platforms.)
- ☐ **eCommerce Platforms** (Digital ads that appear on eCommerce platforms, such as Amazon.com or Instacart.)
- ☐ **Connected TV** (Includes digital advertising that appears on home screens of CTV devices and in-stream video ads that appear on CTVs from platforms like Hulu, Roku and YouTube. CTVs are TV sets connected to the internet through built-in internet capability or through another device such as a Blu-ray player, game console, set-top box (e.g., Apple TV, Google Chromecast, Roku), etc.)
- ☐ **Digital Video** (Includes video ads that appear before, during, or after digital content in a video player, such as YouTube.)
- ☐ **Other** (*specify and explain*):
- ☐ **Don't know/Unsure**

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



39%

You indicated that your business unit/team has used **display advertising** in the past year. Display ad inventory can be purchased through programmatic transaction methods or through direct deals with publishers. Please review the below descriptions about these transaction methods.

Programmatic: Ads that are purchased programmatically are transacted and fulfilled using automation. In programmatic transactions, the price of each impression is typically determined in an auction conducted automatically before the impression is served.

Direct Deals: Ads that are purchased through a direct negotiation, or “direct deal,” with the publisher. In direct deals, the price of the ad inventory is typically set through a one-to-one negotiation between the advertiser and the publisher rather than through an auction. “Direct deals” include programmatic direct deals, such as programmatic guaranteed deals and preferred deals.

Which of the following transaction methods has your business unit/team (or your ad agency) used to purchase **display ad inventory** in the past year?

(Please select all that apply.)

- ☐ Direct Deals
- ☐ Programmatic
- ☐ None of the above
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



42%

You indicated that your business unit/team has used **social advertising** in the past year. Which of the following social media platforms, if any, has your business unit/team advertised on in the past year?

(Please select all that apply.)

- ☐ Twitter
- ☐ Reddit
- ☐ Pinterest
- ☐ Snapchat
- ☐ Tumblr
- ☐ Facebook
- ☐ Instagram
- ☐ TikTok
- ☐ LinkedIn
- ☐ FriendLinX
- ☐ Other social media platforms (*specify*):
- ☐ None of the above
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



45%

In which of the following ways have you personally been involved in your company's **digital display** advertising efforts in the **last 12 months**?

(Select all that apply.)

- ☐ I oversee a team/individuals that measure(s) results of digital display campaigns.
- ☐ I determine overall strategies and/or budgets for digital display.
- ☐ I measure results of digital display campaigns.
- ☐ I oversee a team/individuals that set(s) up audience/target parameters for programmatic digital display buying.
- ☐ I regularly set up audience/target parameters for programmatic digital display buying.
- ☐ I regularly use self-serve ad platforms to manage digital display campaigns.
- ☐ I oversee a team/individuals that use(s) self-serve ad platforms to manage digital display campaigns.
- ☐ I determine which buying tools and/or demand-side platforms (DSPs) to use for digital display.
- ☐ None of the above
- ☐ Don't know/Unsure

Continue »

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46%

This question is testing whether or not you're paying attention while taking this survey. Please select "Somewhat likely" below.

(Please select only one option.)

- ☐ Very likely
- ☐ Somewhat likely
- ☐ Neither unlikely nor likely
- ☐ Not likely
- ☐ Not at all likely
- ☐ Don't know/Unsure

Continue »

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MAIN QUESTIONNAIRE



49%

You have been selected to answer questions about advertising practices used by your business unit, or the team you work on. For each question, if you don't know or are unsure, please don't guess. Simply indicate this in your response by selecting the "Don't know/Unsure" option. There are no right or wrong answers.

Also, you should complete this survey without stopping in the middle. Please make sure not to consult anyone; use your browser's "Back" button; or open another browser while working on this survey.

Continue »

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53%

Do you or do you not use an ad agency for digital advertising?

(Please select one option.)

- ☐ No, I do **not** use an ad agency for digital advertising
- ☐ Yes, I use an ad agency for digital advertising
- ☐ Don't know/Unsure

Continue »

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56%

For which, if any, of the following do you use an ad agency?

(Please select all that apply.)

- ☐ Running advertising tests/experiments
- ☐ Allocating advertising funds across advertising types
- ☐ Content and/or creatives
- ☐ Implementation of advertising (e.g., placing bids, interacting with DSPs)
- ☐ Customer research
- ☐ Tracking advertising performance
- ☐ Budgeting decisions
- ☐ Inventory access
- ☐ Consulting services
- ☐ Media/marketing strategies
- ☐ Other *(specify):*
- ☐ None of the above
- ☐ Don't know/Unsure

Continue »

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57%

The following questions pertain to **digital advertising**.

Previously, you mentioned that your business unit/team has used the following types of **digital advertising** in the past year. What is your best estimate of the share of your business unit/team's **digital advertising** budget that was used for each of these types of advertising in the past year? Specifically, please allocate 100% across the different types of digital advertising shown below based on the share of your total digital advertising budget spent on each type. The total should add up to 100%.

To review the advertising type descriptions, hover your mouse over each digital advertising type.

(Please enter a number from 0 to 100 in each cell, or select "Don't know/Unsure." Please make sure that numbers add up to 100.)

Email	<input type="text"/> %
App/In-App	<input type="text"/> %
eCommerce Platforms	<input type="text"/> %
Social	<input type="text"/> %
Digital Audio	<input type="text"/> %
Programmatic Display	<input type="text"/> %
Direct Deals Display	<input type="text"/> %
Digital Video	<input type="text"/> %
Connected TV	<input type="text"/> %
Search	<input type="text"/> %
Don't know/Unsure	<input type="checkbox"/>
Total: 0 %	

Continue »

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60%

Please read carefully. Now suppose that, based on your analysis, the cost of **programmatic display advertising** has **recently increased by a small but significant amount, and will remain elevated for the foreseeable future**. Assume further that, based on similar analyses for other digital advertising types, the **costs of other digital advertising types** have **not** changed and are not expected to change.

So if the cost of programmatic display advertising increases (while the cost of other advertising types remains the same), **will you or won't you divert some of your advertising spending for the coming year to other types of digital advertising?**

- ☐ No, I will **not** divert any of my advertising spending for the coming year to other types of digital advertising.
- ☐ Yes, I will divert some of my advertising spending for the coming year to other types of digital advertising.
- ☐ Don't know/Unsure

Continue »

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64%

To which other types of digital advertising below, if any, would you divert your advertising spending for the coming year as a result of the increase in the cost of programmatic display advertising?

To review the advertising type descriptions, hover your mouse over each digital advertising type.

(Please select all that apply.)

- ☐ Email
- ☐ App/In-App
- ☐ eCommerce Platforms
- ☐ Social
- ☐ Digital Audio
- ☐ Search
- ☐ Direct Deals Display
- ☐ Digital Video
- ☐ Connected TV
- ☐ Other
- ☐ None of the above
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



64%

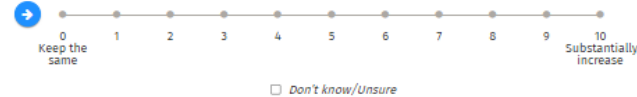
In your previous answer, you indicated that the increase in the cost of programmatic display advertising will lead you to divert some of your advertising spending to the types of digital advertising listed below.

Please use the sliders below to indicate, on a scale of 0 to 10, the extent to which you would divert (that is, increase) advertising spending for the coming year to **each type of digital advertising** that you just indicated.

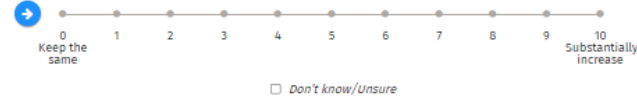
For each digital advertising type below, please select 0 if you expect to keep spending on that type of digital advertising for the coming year and 10 if you expect to substantially increase spending on that type of digital advertising.

To review the advertising type descriptions, hover your mouse over each digital advertising type.

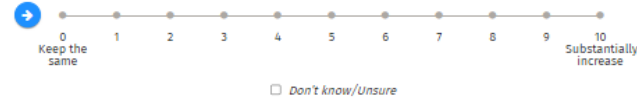
Email



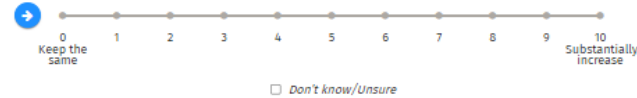
App/In-App



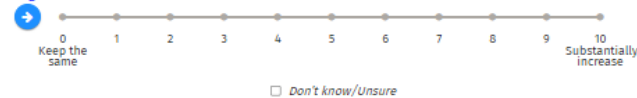
eCommerce Platforms



Social



Digital Audio



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66%

An ad buying tool is a programmatic advertising platform that allows advertisers and media buying agencies to bid automatically on display ad inventory from a wide range of publishers. Some ad buying tools can also be used to buy video and search ad inventory. Ad buying tools include demand side platforms, or “DSPs.”

Which of the following ad buying tools, if any, have you and/or your business unit/team used during the **past year for programmatic display advertising?**

(Please select all that apply.)

Xandr Invest	<input type="checkbox"/>	Adelphic	<input type="checkbox"/>
Simpli.fi	<input type="checkbox"/>	MediaMath DSP	<input type="checkbox"/>
Yahoo DSP (formerly Verizon Media DSP)	<input type="checkbox"/>	Ad Step Technologies	<input type="checkbox"/>
Adobe Advertising Cloud	<input type="checkbox"/>	Adform	<input type="checkbox"/>
Outbrain	<input type="checkbox"/>	Basis by Centro	<input type="checkbox"/>
Zeta Global	<input type="checkbox"/>	StackAdapt	<input type="checkbox"/>
Criteo	<input type="checkbox"/>	Beeswax	<input type="checkbox"/>
Google Ads	<input type="checkbox"/>	Amazon DSP	<input type="checkbox"/>
Google Display and Video 360 (DV360)	<input type="checkbox"/>	Taboola	<input type="checkbox"/>
Amobee	<input type="checkbox"/>	Quorexx	<input type="checkbox"/>
illumina (formerly AcuityAds)	<input type="checkbox"/>	Other (please specify): <input type="text"/>	<input type="checkbox"/>
The Trade Desk DSP	<input type="checkbox"/>	Don't know/Unsure	<input type="checkbox"/>
Quantcast	<input type="checkbox"/>		

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



68%

Why did you and/or your business unit/team use more than one **ad buying tool** for **programmatic display advertising** in the past year?

(Please type in your response or select "Don't know/Unsure")

☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



69%

Do you and/or your business unit/team expect to use the same number, more, or fewer **ad buying tools** for **programmatic display advertising** next year?

(Please select only one option.)

- ☐ I expect to use **more** ad buying tools for programmatic display advertising next year.
- ☐ I expect to use the **same number** of ad buying tools for programmatic display advertising next year.
- ☐ I expect to use **fewer** ad buying tools for programmatic display advertising next year.
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



72%

You indicated that, compared to the past year, you expect to use **more ad buying tools** for programmatic display advertising next year. Why do you and/or your business unit/team expect to use **more** ad buying tools for **programmatic display advertising** next year?

(Please type in your response, or select "Don't know/Unsure".)

☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



74%

Which of the following factors, if any, do you and/or your business unit/team consider when deciding to use a particular **ad buying tool** for **programmatic display advertising**?

(Please select all that apply.)

- ☐ Audience scale/Reach
- ☐ Cost
- ☐ Identity management
- ☐ Reporting features
- ☐ API and integrations
- ☐ Brand safety/fraud protection
- ☐ Forecasting tools
- ☐ Media optimization of placements during a campaign
- ☐ Support
- ☐ Ease of use/User interface
- ☐ Ad placement effectiveness
- ☐ Budget management tools
- ☐ Targeting criteria and capabilities
- ☐ Troubleshooting capabilities
- ☐ Other *(please specify):*
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



76%

Have you and/or your business unit/team stopped using any **ad buying tool(s)** for **programmatic display advertising** in the **past year**?

(Please select only one option.)

- ☐ Yes, I and/or my business unit/team stopped using at least one ad buying tool in the past year.
- ☐ No, I and/or my business unit/team have **not** stopped using any ad buying tools in the past year.
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



80%

You indicated that you and/or your business unit/team stopped using at least one **ad buying tool** in the **past year** for **programmatic display advertising**. What factors led you and/or your business unit/team to stop using one or more ad buying tools for **programmatic display advertising**?

(Please type your response in the text box below or select "Don't know/Unsure".)

☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



81%

Have you and/or your business unit/team started using any **ad buying tool(s)** in the **past year** for **programmatic display advertising**?

(Please select only one option.)

- ☐ Yes, I and/or my business unit/team started using at least one ad buying tool in the past year.
- ☐ No, I and/or my business unit/team have **not** started using any ad buying tools in the past year.
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



84%

You indicated that you and/or your business unit/team started using at least one **ad buying tool** in the **past year** for **programmatic display advertising**. What factors led you and/or your business unit/team to start using one or more ad buying tools for **programmatic display advertising**?


(Please type your response in the text box below or select "Don't know/Unsure".)

☐ Don't know/Unsure

Continue »

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85%



AD PROS™

ADVERTISER PERCEPTIONS

Which of the following metrics, if any, are you and/or your business unit/team using to assess the performance of programmatic display ads, direct deals display ads, social media ads and/or digital video ads?

To review the advertising type descriptions, hover your mouse over each digital advertising type.
(Please select all that apply in each column.)

	Programmatic display ads	Digital video ads	Social media ads	Direct deals display ads
Return on Ad Spend (ROAS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conversions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clicks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Click through rate (CTR)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Impressions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost per action (CPA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost per click (CPC)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Return on Investment (ROI)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost per impression (CPM)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify): <input type="text"/>	<input type="checkbox"/>			
Other (please specify): <input type="text"/>				<input type="checkbox"/>
Other (please specify): <input type="text"/>			<input type="checkbox"/>	
Other (please specify): <input type="text"/>		<input type="checkbox"/>		
None of the above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Don't know/Unsure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



87%

You indicated that you and/or your business unit/team use the following metrics to assess the performance of **programmatic display ads**. Please rank these metrics in terms of how **important they are to accurately assessing the performance of programmatic display ads**, with 1 being the most important and 3 being the least important.

(Please rank the following metrics, or select "Don't know/Unsure".)

Return on Ad
Spend (ROAS)

Clicks

Cost per click
(CPC)

Don't know/Unsure

Rank 1

Rank 2

Rank 3

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



89%

How often, if at all, do you and/or your business unit/team measure or assess the performance of your **programmatic display advertising**?

(Please select only one option.)

If you are using an ad agency and they are responsible for measuring or assessing performance of your programmatic display advertising, please indicate how often you receive information about the performance of your programmatic display advertising from the agency.

- ☐ Annually
- ☐ Quarterly
- ☐ Monthly
- ☐ Weekly
- ☐ Daily
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



92%

In the past year, have you and/or your business unit/team run any experimental or test & learn initiatives on your **programmatic display ads**?

(Please select only one option.)

- ☐ Yes
- ☐ No
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



95%

Which of the following types of experiments or test & learn initiatives, if, any, have you and/or your business unit/team run in the past year on your **programmatic display ads**?

I and/or my business unit/team have run experiments and/or test & learn initiatives testing...

(Please select all that apply.)

- ☐ Bid strategies
- ☐ Publishers
- ☐ Creatives
- ☐ Ad buying tool performance
- ☐ Audiences
- ☐ ROI/ROAS
- ☐ Other *(please specify):*
- ☐ Don't know/Unsure

Continue »

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FOLLOW UP QUESTION



99%

This survey is being conducted by consultants that have been retained on behalf of Google in connection with pending antitrust lawsuits in which the plaintiffs allege that Google engaged in anticompetitive conduct related to digital advertising.

If you are willing to participate in this survey, please click “Include my responses” below. As a reminder, your responses will be kept anonymous and will be analyzed as part of a larger sample of responses.

If you do not want to participate in this survey, please click “Exclude my responses” below.

- ☐ Include my responses
- ☐ Exclude my responses

Finish

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



Thank you for taking our survey. Your efforts are greatly appreciated!

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APPENDIX F.3 HIGHER-SPEND ADVERTISER SURVEY RAW DATA

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

PRODUCED AS NATIVE

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

APPENDIX G LOWER-SPEND ADVERTISER SURVEY

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

APPENDIX G.1 LOWER-SPEND ADVERTISER SURVEY SCRIPT

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**Lower-Spend Advertiser Survey
Screener and Main Survey Programmer Instructions**

LEGEND:

[PROGRAMMER NOTES IN BOLD CAPS AND BRACKETS]

Notes to respondent in italics

FORMAT: The survey consists of the following sections:

Introduction & Screening (questions labeled QS)
Main Survey Questions (questions labeled Q)
Follow-Up Questions (questions labeled QF)

Overview

[NO RESPONDENTS TO BE CONTACTED AT COMPANIES FROM THE LIST OF ENTITIES TO BE EXCLUDED]

[PANEL CONSISTS OF RESPONDENTS WHO ARE 18+, BASED IN THE U.S., AND WHOSE JOB FUNCTION RELATES TO MARKETING AND/OR ADVERTISING]

[TARGET 300 COMPLETES]

[DISABLE THE BROWSER’S “BACK” BUTTON AND DO NOT SHOW A “BACK” BUTTON WITHIN THE SURVEY]

[FORCE RESPONSES TO ANSWER ALL QUESTIONS UNLESS OTHERWISE SPECIFIED]

[DISPLAY ONE QUESTION PER PAGE UNLESS OTHERWISE SPECIFIED]

[NO SURVEY OR SECTION TITLES TO BE DISPLAYED TO RESPONDENTS]

[DIGITAL FINGERPRINTING SHOULD BE USED TO AVOID REPEAT PARTICIPATION]

[TEXT FOR TERMINATES: “THANK YOU FOR YOUR INTEREST IN OUR STUDY. YOU DO NOT QUALIFY FOR THIS STUDY. WE APPRECIATE YOUR TIME.”]

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Introduction and Screening

QS1. Please enter the code exactly as it appears in the box below, and then click “Continue” to continue.

[INSERT CAPTCHA; TERMINATE AFTER THREE INCORRECT ATTEMPTS]

QS2. Thank you for participating in our study. Your opinions are very important to us. If you don’t know an answer to a question or if you don’t have an opinion, please don’t guess. Simply indicate this in your response by selecting the “Don’t know / Unsure” option. There are no right or wrong answers.

Your responses will be kept anonymous and will be analyzed as part of a larger sample of responses. The results of this study will not be used to try to sell you anything.

If you wear glasses or corrective lenses when using a desktop computer, laptop computer, or tablet, please wear them throughout the survey.

Please do not use the “Back” button of your browser while taking the survey. When you are ready to get started, please select the “Continue” button.

QS3. What is your age? *(Please select only one option.)*

[FLIP ORDER PER RESPONDENT, AS IS AND REVERSE; KEEP “PREFER NOT TO ANSWER” LAST]

- ☐ Under 18 **[TERMINATE]**
- ☐ 18 - 34
- ☐ 35 - 49
- ☐ 50 - 64
- ☐ 65 or above
- ☐ Prefer not to answer **[TERMINATE]**

QS4. What is your gender? *(Please select only one option.)*

[RANDOMIZE; KEEP “OTHER” AND “PREFER NOT TO ANSWER” LAST]

- ☐ Male
- ☐ Female
- ☐ Other: **[INSERT TEXT BOX]**
- ☐ Prefer not to answer

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

QS5. In which state do you live? *(Please select only one option.)*

[INSERT DROP DOWN MENU OF ALL 50 STATES AND DC, PLUS “OTHER” AND “DON’T KNOW / UNSURE”]

[TERMINATE IF “OTHER” OR “DON’T KNOW / UNSURE” IS SELECTED]

QS6. Which of the following do you have any involvement in as part of your job responsibilities? *(Please select all that apply.)*

[RANDOMIZE; KEEP “OTHER” LAST]

- ☐ Hiring/HR
- ☐ IT/Tech
- ☐ Business intelligence/Data science
- ☐ Sales or account management
- ☐ Accounting/Finance
- ☐ Advertising or Marketing
- ☐ Website/Mobile App design/development
- ☐ Customer relationship management
- ☐ Data analysis/statistics
- ☐ Other *(specify)*:

[TERMINATE IF “Advertising or Marketing” IS NOT SELECTED]

QS7. Which of the following best characterizes the type of company you work for? *(Please select only one option.)*

[RANDOMIZE; KEEP “OTHER” LAST]

- ☐ **Products/Services Business** – your company sells products or services and advertises/markets its products or services
- ☐ **Creative Agency** – your company designs or produces marketing content and/or advises clients on their creative media/marketing strategies **[TERMINATE]**
- ☐ **Media Agency** – your company advises clients on their media/marketing strategies and/or how to spend their advertising funds **[TERMINATE]**
- ☐ **Full Service Agency** – your company handles both Creative and Media strategy and/or execution **[TERMINATE]**
- ☐ **Other** *(please describe)*: **[INSERT TEXT BOX] [TERMINATE]**

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QS8. Which of the following, if any, best characterizes the market sector/industry your company is in? *(Please select only one option.)*

[DO NOT RANDOMIZE]

- ☐ Advertising or Marketing
- ☐ Apparel/Fashion
- ☐ Automotive
- ☐ B2B/Services for Businesses
- ☐ Consumer Electronics
- ☐ Education
- ☐ Financial Products/Services for Consumers (including Fintech)
- ☐ Food and Beverage
- ☐ Government
- ☐ Health and Beauty Products
- ☐ Home Products/Appliances
- ☐ Health Care or Medical Services
- ☐ Media and Entertainment
- ☐ Non-Profit
- ☐ Pharmaceuticals and Remedies (Rx or OTC)
- ☐ Restaurants
- ☐ Retail (including Ecommerce)
- ☐ Telecommunications
- ☐ Travel and Hospitality
- ☐ Other *(Please describe)*: **[INSERT TEXT BOX]**

QS9. Which of the following best characterizes your current job title/level? *(Please select only one option.)*

[RANDOMIZE; KEEP “OTHER” LAST]

- ☐ C-Level (CEO, COO, CMO, etc.)
- ☐ Vice President, SVP, EVP, President, etc.
- ☐ Director
- ☐ Supervisor/Department Head/Group Manager
- ☐ Manager
- ☐ Strategist
- ☐ Associate
- ☐ Analyst
- ☐ Buyer
- ☐ Planner
- ☐ Other *(please describe)*: **[INSERT TEXT BOX]**

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

QS10. Approximately how much did your company spend in the last 12 months on all advertising, including all digital types (e.g., display, video, audio, social) plus all nondigital types (e.g., TV types, print, OOH, etc.)? *(Please select only one option.)*

[FLIP ORDER PER RESPONDENT, AS IS AND REVERSE; KEEP “DON’T KNOW / UNSURE” LAST]

- ☐ Less than \$10,000
- ☐ \$10,000 to less than \$25,000
- ☐ \$25,000 to less than \$50,000
- ☐ \$50,000 to less than \$100,000
- ☐ \$100,000 to less than \$250,000
- ☐ \$250,000 to less than \$500,000
- ☐ \$500,000 to less than \$1 million **[TERMINATE]**
- ☐ \$1 million to less than \$3 million **[TERMINATE]**
- ☐ \$3 million to less than \$7 million **[TERMINATE]**
- ☐ \$7 million to less than \$15 million **[TERMINATE]**
- ☐ \$15 million to less than \$30 million **[TERMINATE]**
- ☐ \$30 million to less than \$50 million **[TERMINATE]**
- ☐ \$50 million to less than \$100 million **[TERMINATE]**
- ☐ \$100 million to less than \$250 million **[TERMINATE]**
- ☐ \$250 million to less than \$500 million **[TERMINATE]**
- ☐ \$500 million or more **[TERMINATE]**
- ☐ Don’t know / Unsure **[TERMINATE]**

QS11. Please think about your total advertising budget. In the past year, what percentage of your total advertising budget was used for **digital (online) advertising**, as opposed to **offline advertising**? Please give your best estimate. *(Please enter a number from 0 to 100 for each type of advertising, or select “Don’t know / Unsure.” Values must add up to 100%)*

[FOR ERRORS, DISPLAY THE FOLLOWING ERROR MESSAGE: “Please enter a whole number between 0 and 100 for each advertising type, or select “Don’t know / Unsure.” Values must add up to 100”][SHOW TOTAL AT BOTTOM]

[RANDOMIZE ORDER, KEEP “DON’T KNOW / UNSURE” LAST]

Percentage of budget spent on **digital (online) advertising** last year:

Percentage of budget spent on **offline advertising** last year:

TOTAL **[SHOW SUM OF NUMBERS ABOVE]**

- ☐ Don’t know / Unsure **[EXCLUSIVE]**

[TERMINATE IF DIGITAL (ONLINE) = 0]

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QS12. Which of the following types of **digital advertising**, if any, have you used in the past year? Please review the description of each advertising type **carefully**. *(Please select all that apply.)*

[RANDOMIZE ORDER; KEEP “OTHER” AND “DON’T KNOW / UNSURE” LAST]

	Advertising Type	Description
<input type="checkbox"/>	Search	Digital ads placed on search engine result pages. Ads generally consist of a headline, description, and a link to the destination URL.
<input type="checkbox"/>	Display	Digital ads made up of text, image, video, and/or other multimedia components that typically appear along the top or sides of a website, or sometimes in the middle of other content on a website. Examples of display ad formats include banner ads, animations, and interactive content. Display ads do not include ads placed on social media platforms.
<input type="checkbox"/>	Email	Digital ads sent via email to current and potential customers.
<input type="checkbox"/>	Digital Audio	Recorded advertisements that play between or during songs, podcasts, or other digital audio content.
<input type="checkbox"/>	Social	Digital ads placed on social media platforms such as Facebook, Instagram, LinkedIn, Snapchat, and Twitter.
<input type="checkbox"/>	App/In-App	Digital ads placed and displayed within mobile apps. Does not include ads placed on social media platforms.
<input type="checkbox"/>	Digital Video	Includes video ads that appear before, during, or after digital content in a video player, such as YouTube.
<input type="checkbox"/>	Connected TV	Includes digital advertising that appears on home screens of CTV devices and in-stream video ads that appear on CTVs from platforms like Hulu, Roku and YouTube. CTVs are TV sets connected to the internet through built-in internet capability or through another device such as a Blu-ray player, game console, set-top box (e.g., Apple TV, Google Chromecast, Roku), etc.
<input type="checkbox"/>	eCommerce Platforms	Digital ads that appear on eCommerce platforms, such as Amazon.com or Instacart.
<input type="checkbox"/>	Other <i>(specify and explain)</i> : [INSERT TEXT BOX]	
<input checked="" type="radio"/> Don't know / Unsure [EXCLUSIVE]		

[TERMINATE IF “DISPLAY” IS NOT SELECTED]

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

QS13. In which of the following ways have you personally been involved in your company's **digital display** advertising efforts in the **last 12 months**? (*Select all that apply.*)

[RANDOMIZE; KEEP “NONE OF THE ABOVE” AND “DON’T KNOW / UNSURE” LAST]

- ☐ I determine overall strategies and/or budgets for digital display.
- ☐ I determine which tools and/or platforms to use for digital display.
- ☐ I regularly use self-serve ad platforms to manage digital display campaigns.
- ☐ I oversee a team/individuals that use(s) self-serve ad platforms to manage digital display campaigns.
- ☐ I regularly set up audience/target parameters for digital display campaigns.
- ☐ I measure results of digital display campaigns.
- ☐ None of the above **[EXCLUSIVE] [TERMINATE]**
- ☐ Don't know / Unsure **[EXCLUSIVE] [TERMINATE]**

[TERMINATE IF NONE OF “I determine overall strategies and/or budgets for digital display”, “I determine which tools and/or platforms to use for digital display”, “I regularly use self-serve ad platforms to manage digital display campaigns”, AND “I oversee a team/individuals that use(s) self-serve ad platforms to manage digital display campaigns” ARE SELECTED]

QS14. This question is testing whether or not you're paying attention while taking this survey. Please select “Somewhat likely” below. (*Please select only one option.*)

[FLIP ORDER PER RESPONDENT, AS IS AND REVERSE; KEEP “DON’T KNOW / UNSURE” LAST]

- ☐ Not at all likely **[TERMINATE]**
- ☐ Not likely **[TERMINATE]**
- ☐ Neither unlikely nor likely **[TERMINATE]**
- ☐ Somewhat likely
- ☐ Very likely **[TERMINATE]**
- ☐ Don't know / Unsure **[TERMINATE]**

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Main Questionnaire

Q1. You have been selected to answer questions about advertising practices you have used. For each question, if you don't know or are unsure, please don't guess. Simply indicate this in your response by selecting the "Don't know / Unsure" option. There are no right or wrong answers.

Also, you should complete this survey without stopping in the middle. Please make sure not to consult anyone; use your browser's "Back" button; or open another browser while working on this survey.

Use of Ad Agencies

Q2. Do you or do you not use an ad agency and/or a consultant for digital advertising? *(Please select one option.)*

[FLIP ORDER PER RESPONDENT, AS IS AND REVERSE; KEEP "DON'T KNOW / UNSURE" LAST]

- ☐ Yes, I use an ad agency and/or a consultant for digital advertising
- ☐ No, I do **not** use an ad agency and/or a consultant for digital advertising
- ☐ Don't know / Unsure

Q3. **[IF RESPONDENT SELECTED "YES" IN Q2]** For which, if any, of the following do you use an ad agency and/or a consultant? *(Please select all that apply.)*

[RANDOMIZE ORDER; KEEP "OTHER," "NONE OF THE ABOVE," AND "DON'T KNOW / UNSURE" LAST]

- ☐ Content and/or creatives
- ☐ Consulting services
- ☐ Media/marketing strategies
- ☐ Allocating advertising funds across advertising types
- ☐ Budgeting decisions
- ☐ Customer research
- ☐ Implementation of advertising (e.g., placing bids, interacting with DSPs)
- ☐ Tracking advertising performance
- ☐ Inventory access
- ☐ Running advertising tests/experiments
- ☐ Other (*specify*): **[INSERT TEXT BOX]**
- ☐ None of the above **[EXCLUSIVE]**
- ☐ Don't know / Unsure **[EXCLUSIVE]**

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Advertising Channels and Usage

Q4. You mentioned that you have used **digital display advertising** in the **last 12 months**.

Digital display ads are digital ads made up of text, image, video and/or other multimedia components that typically appear along the top or sides of a website, or sometimes in the middle of other content on a website. Examples of display ad formats include banner ads, animations, and interactive content. Display ads do not include ads placed on social media platforms.

Which of the following platforms, if any, have you used during the **last 12 months** for **digital display advertising**? *(Please select all that apply)*

[RANDOMIZE ORDER; KEEP “OTHER,” “NONE OF THE ABOVE”, AND “DON’T KNOW / UNSURE” LAST]

- ☐ Google Ads
- ☐ Google Display and Video 360 (DV360)
- ☐ Adobe Advertising Cloud
- ☐ Amazon DSP
- ☐ Amobee
- ☐ MediaMath
- ☐ Quantcast
- ☐ The Trade Desk
- ☐ Yahoo DSP (formerly Verizon Media)
- ☐ Criteo
- ☐ Ad Step Technologies
- ☐ Other *(please specify)*: [TEXT BOX]
- ☒ Don’t know / Unsure [EXCLUSIVE]

Q5. **[IF “SOCIAL” WAS SELECTED IN QS12]** You indicated that you have used **social advertising** in the **last 12 months**.

Social ads are digital ads placed on social media platforms such as Facebook, Instagram, LinkedIn, Snapchat, and Twitter.

Which of the following platforms, if any, have you used during the **last 12 months** for **social advertising**? *(Please select all that apply.)*

[RANDOMIZE ORDER; KEEP “OTHER,” “NONE OF THE ABOVE”, AND “DON’T KNOW / UNSURE” LAST]

- ☐ Facebook
- ☐ Instagram
- ☐ Pinterest
- ☐ Snapchat
- ☐ TikTok

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

- ☐ Twitter
- ☐ LinkedIn
- ☐ Reddit
- ☐ Tumblr
- ☐ FriendLinx
- ☐ Other social media platforms (*specify*): [INSERT TEXT BOX]
- ☒ Don't know / Unsure [EXCLUSIVE]

Q6. What factors do you consider when deciding where to buy **digital ads** from? (*Please type your response in the text box below, or select "Don't know / Unsure".*)

[INSERT TEXT BOX]

[REQUIRE AT LEAST 4 CHARACTERS; IF ENTRY IS LESS THAN 4 CHARACTERS, SHOW ERROR "*Please be thorough in your response.*"]

- ☒ Don't know / Unsure [EXCLUSIVE] [SKIP TO QS8]

Q7. In addition to the factors you just mentioned, what other factors, if any, do you consider when deciding where to buy **digital ads** from?

[INSERT TEXT BOX]

[REQUIRE AT LEAST 4 CHARACTERS; IF ENTRY IS LESS THAN 4 CHARACTERS, SHOW ERROR "*Please be thorough in your response.*"]

- ☒ Don't know / Unsure [EXCLUSIVE]

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Budget Allocation and Substitution

Q8. The following questions pertain to **digital advertising**.

Previously, you mentioned that you have used the following types of **digital advertising** in the past year. What is your best estimate of the share of your **digital advertising spending** that was used for each of these types of advertising in the past year? Specifically, please allocate 100% across the different types of digital advertising shown below based on the share of your total digital advertising spending on each type. The total should add up to 100%.

To review the advertising type descriptions, hover your mouse over each digital advertising type.

(Please enter a number from 0 to 100 in each cell, or select “Don’t know / Unsure.” Please make sure that numbers add up to 100.)

[SHOW ALL ANSWER OPTIONS SELECTED IN QS12 WITH TEXT BOX REQUIRING WHOLE NUMBER BETWEEN 0 AND 100. RANDOMIZE ORDER; KEEP “OTHER” AND “DON’T KNOW / UNSURE” LAST. SHOW RUNNING TOTAL AT THE BOTTOM OF THE PAGE WITH THE SUM OF THE NUMBERS ENTERED]

[DISPLAY DESCRIPTIONS FROM QS12 WHEN RESPONDENT HOVERS OVER TYPE OF ADVERTISING]

[THE SUM OF ALL NUMBERS MUST EQUAL 100. IF RESPONDENT CLICKS “NEXT” AND THE SUM OF THE NUMBERS IS NOT EQUAL TO 100, SHOW THE FOLLOWING ERROR MESSAGE: “Sorry, your answers do not add up to 100. Please try again.”]

[FOR ALL OTHER ERRORS, DISPLAY THE FOLLOWING ERROR MESSAGE: “Please specify a whole number in each cell, and do not leave any cell blank. Please enter 0 if you do not spend any portion of your advertising budget on a type of advertising.”]

Search:	<input type="text"/>
Display:	<input type="text"/>
Email:	<input type="text"/>
Digital Audio:	<input type="text"/>
Social:	<input type="text"/>
App/In-App:	<input type="text"/>
Digital Video:	<input type="text"/>
Connected TV:	<input type="text"/>
eCommerce Platforms:	<input type="text"/>

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Other

TOTAL

**[SHOW SUM OF NUMBERS
ABOVE]**

☐ Don't know / Unsure **[EXCLUSIVE]**

Q9. Please read carefully. Now suppose that, based on your analysis, the cost of **display advertising** has **recently increased by a small but significant amount, and will remain elevated for the foreseeable future.** Assume further that, based on similar analyses for other digital advertising types, the **costs of other digital advertising types** have **not** changed and are not expected to change.

So, if the cost of display advertising increases (while the cost of other advertising types remains the same), will you or won't you divert some of your advertising spending for the coming year to other types of digital advertising?

[FLIP ORDER PER RESPONDENT, AS IS AND REVERSE; KEEP “DON'T KNOW / UNSURE” LAST]

- ☐ Yes, I will divert some of my advertising spending for the coming year to other types of digital advertising
- ☐ No, I will **not** divert any of my advertising spending for the coming year to other types of digital advertising **[SKIP TO Q12]**
- ☐ Don't know / Unsure **[SKIP TO Q12]**

Q10. To which other types of digital advertising below, if any, would you divert your advertising spending for the coming year as a result of the **increase in the cost of display advertising?**

To review the advertising type descriptions, hover your mouse over each digital advertising type.

(Please select all that apply.)

[RANDOMIZE ORDER; KEEP “OTHER,” “NONE OF THE ABOVE” AND “DON'T KNOW / UNSURE” LAST]

[DISPLAY DESCRIPTIONS FROM QS12 WHEN RESPONDENT HOVERS OVER TYPE OF ADVERTISING]

- ☐ Search
- ☐ Email
- ☐ Digital Audio
- ☐ Social
- ☐ App/In-App
- ☐ Digital Video
- ☐ Connected TV

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

- ☐ eCommerce Platforms
- ☐ Other
- ☒ None of the above [EXCLUSIVE] [SKIP TO Q12]
- ☒ Don't know / Unsure [EXCLUSIVE] [SKIP TO Q12]

Q11. In your previous answer, you indicated that the increase in the cost of display advertising will lead you to divert some of your advertising spending to the types of digital advertising listed below.

Please use the sliders below to indicate, on a scale of **0** to **10**, the extent to which you would divert (that is, increase) advertising spending for the coming year to **each type of digital advertising** that you just indicated.

For each digital advertising type below, please select **0** if you expect to keep spending on that type of digital advertising for the coming year and **10** if you expect to substantially increase spending on that type of digital advertising.

To review the advertising type descriptions, hover your mouse over each digital advertising type.

[SHOW ANSWER OPTIONS SELECTED IN Q10. MATCH ORDER OF RESPONSES TO Q10. FOR EACH ADVERTISING TYPE, SHOW SLIDER FROM 0 TO 10, LABEL 0 “KEEP THE SAME” AND 10 “SUBSTANTIALLY INCREASE”. INCLUDE OPTION FOR “DON’T KNOW / UNSURE”.]

[DISPLAY DESCRIPTIONS FROM QS12 WHEN RESPONDENT HOVERS OVER TYPE OF ADVERTISING]

Search	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure
Email	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure
Digital Audio	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure
Social	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure
App/In-app	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure
Digital Video	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure
Connected TV	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure
eCommerce Platforms	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure
Other	[INSERT SLIDER]	<input checked="" type="radio"/> Don't know / Unsure

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Measuring Performance

Q12. [ONLY INCLUDE ADVERTISING TYPES SELECTED IN QS12] Which of the following metrics, if any, are you using to assess the performance of **display ads** [IF “SOCIAL” WAS SELECTED IN QS12, and/or **social media ads**]?

To review the advertising type descriptions, hover your mouse over each digital advertising type.

(Please select all that apply in each column.)

[RANDOMIZE ORDER OF ROWS, KEEP “OTHER,” “NONE OF THE ABOVE,” AND “DON’T KNOW / UNSURE” LAST. RANDOMIZE ORDER OF COLUMNS]

[DISPLAY DESCRIPTIONS FROM QS12 WHEN RESPONDENT HOVERS OVER TYPE OF ADVERTISING]

Metric	Display ads	Social media ads
Impressions	<input type="checkbox"/>	<input type="checkbox"/>
Clicks	<input type="checkbox"/>	<input type="checkbox"/>
Conversions	<input type="checkbox"/>	<input type="checkbox"/>
Cost per impression (CPM)	<input type="checkbox"/>	<input type="checkbox"/>
Cost per click (CPC)	<input type="checkbox"/>	<input type="checkbox"/>
Cost per action (CPA)	<input type="checkbox"/>	<input type="checkbox"/>
Return on Ad Spend (ROAS)	<input type="checkbox"/>	<input type="checkbox"/>
Return on Investment (ROI)	<input type="checkbox"/>	<input type="checkbox"/>
Click through rate (CTR)	<input type="checkbox"/>	<input type="checkbox"/>
Other <i>(please specify)</i> : [TEXT BOX]	<input type="checkbox"/>	<input type="checkbox"/>
None of the above [EXCLUSIVE]	<input type="radio"/>	<input type="radio"/>
Don’t know / Unsure [EXCLUSIVE]	<input type="radio"/>	<input type="radio"/>

Q13. [ONLY IF MORE THAN ONE METRIC UNDER DISPLAY ADS ARE SELECTED IN Q12] The following questions pertain to **digital display advertising**.

You indicated that you use the following metrics to assess the performance of **digital display ads**. Please rank these metrics in terms of **how important they are to accurately assessing the performance of digital display ads**, with 1 being the most important and [NUMBER OF MEASURES SELECTED UNDER DISPLAY ADS IN Q12] being the least important. *(Please rank the following metrics, or select “Don’t know / Unsure”)*

[HAVE RESPONDENTS ASSIGN A RANK FROM 1 TO THE NUMBER OF RESPONSES SELECTED UNDER DISPLAY ADS IN Q12 FOR EACH PERFORMANCE METRIC]

☐ Don’t know / Unsure [EXCLUSIVE]

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Q14. How often, if at all, do you assess the performance of your **digital display advertising**?
(Please select only one option)

If you are using an ad agency and/or a consultant and they are responsible for measuring or assessing performance of your display advertising, please indicate how often you receive information about the performance of your **digital display advertising** from the agency.

[RANDOMIZE ORDER AS IS AND REVERSE; KEEP “DON’T KNOW / UNSURE” LAST]

- ☐ Daily
- ☐ Weekly
- ☐ Monthly
- ☐ Quarterly
- ☐ Annually
- ☐ Don’t know / Unsure

Q15. In the past year, have you run any experiments or test & learn initiatives on your **digital display ads**? (Please select only one option.)

[RANDOMIZE ORDER AS IS AND REVERSE; KEEP “DON’T KNOW / UNSURE” LAST]

- ☐ Yes
- ☐ No
- ☐ Don’t know / Unsure

Q16. **[IF “YES” IN Q15]** Which of the following types of experiments or test & learn initiatives, if any, have you run in the past year on your **digital display ads**?

I have run experiments and/or test & learn initiatives testing... (Please select all that apply.)

[RANDOMIZE ORDER, KEEP “OTHER” AND “DON’T KNOW / UNSURE” LAST]

- ☐ Creatives
- ☐ Bid strategies
- ☐ Audiences
- ☐ Publishers
- ☐ Ad buying tool performance
- ☐ ROI/ROAS
- ☐ Other (please specify): **[TEXT BOX]**
- ☐ Don’t know / Unsure **[EXCLUSIVE]**

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Follow Up Question

QF1. This survey is being conducted by consultants that have been retained on behalf of Google in connection with pending antitrust lawsuits in which the plaintiffs allege that Google engaged in anticompetitive conduct related to digital advertising.

If you are willing to participate in this survey, please click “Include my responses” below. As a reminder, your responses will be kept anonymous and will be analyzed as part of a larger sample of responses.

If you do not want to participate in this survey, please click “Exclude my responses” below.

[RANDOMIZE ORDER]


- ☐ Include my responses
- ☐ Exclude my responses

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

APPENDIX G.2 LOWER-SPEND ADVERTISER SURVEY SCREENSHOTS

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

INTRODUCTION AND SCREENING



0%

Please enter the code exactly as it appears in the box below, and then click “Continue” to continue.

YJHEC1

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



3%

Thank you for participating in our study. Your opinions are very important to us. If you don't know an answer to a question or if you don't have an opinion, please don't guess. Simply indicate this in your response by selecting the "Don't know/Unsure" option. There are no right or wrong answers.

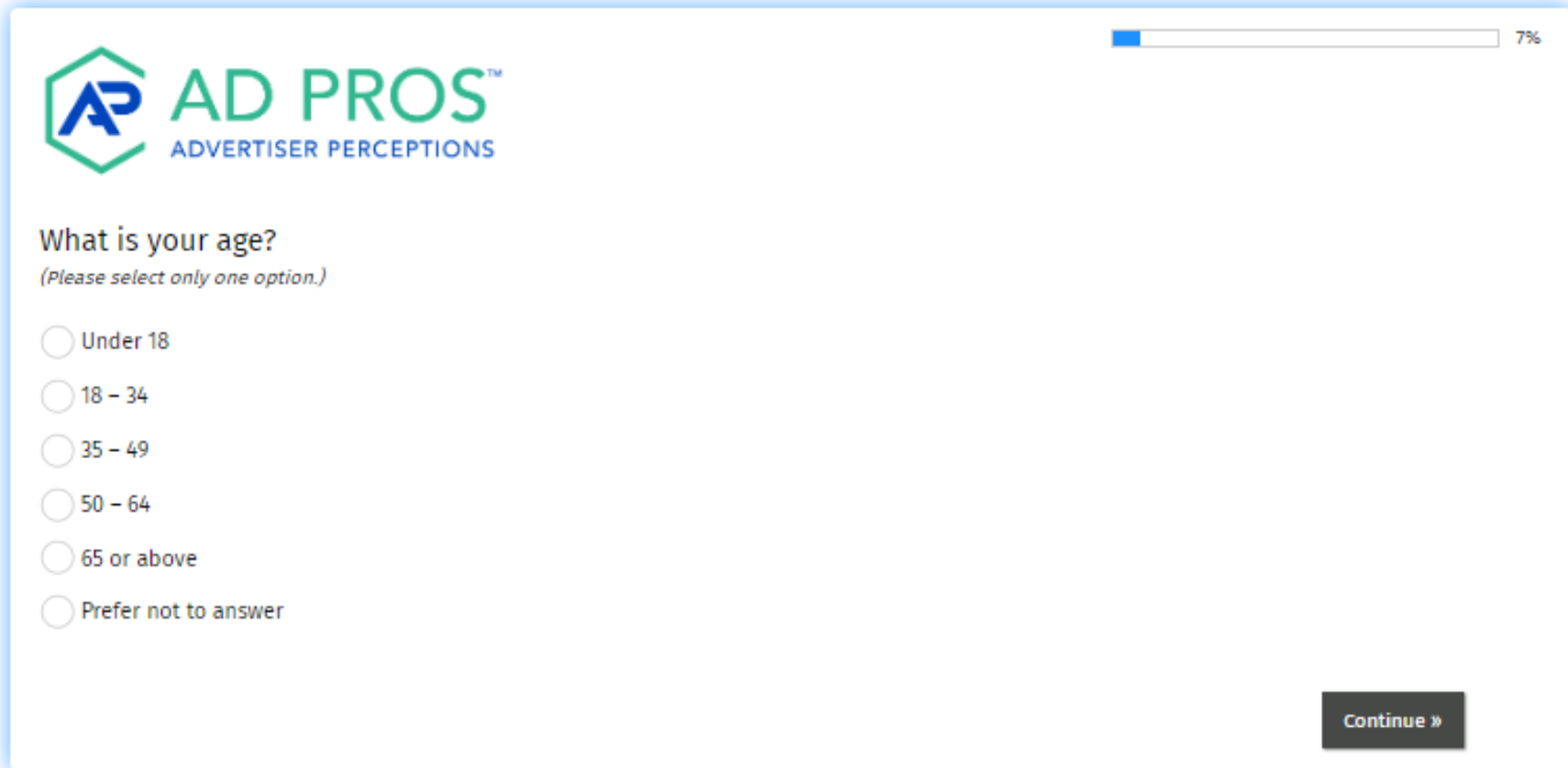
Your responses will be kept anonymous and will be analyzed as part of a larger sample of responses. The results of this study will not be used to try to sell you anything.

If you wear glasses or corrective lenses when using a desktop computer, laptop computer, or tablet, please wear them throughout the survey.

Please do not use the "Back" button of your browser while taking the survey. When you are ready to get started, please select the "Continue" button.

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



AD PROS™
ADVERTISER PERCEPTIONS

7%

What is your age?
(Please select only one option.)

☐ Under 18

☐ 18 - 34

☐ 35 - 49


☐ 50 - 64

☐ 65 or above

☐ Prefer not to answer

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



11%

What is your gender?
(Please select only one option.)

☐ Male


☐ Female

☐ Other:

☐ Prefer not to answer

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER




14%

In which state do you live?
(Please select only one option.)

Select one...

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



18%

Which of the following do you have any involvement in as part of your job responsibilities?
(Please select all that apply.)

- ☐ Accounting/Finance
- ☐ Business intelligence/Data science
- ☐ Sales or account management
- ☐ Hiring/HR
- ☐ IT/Tech
- ☐ Data analysis/statistics
- ☐ Customer relationship management
- ☐ Website/Mobile App design/development
- ☐ Advertising or Marketing
- ☐ Other *(specify):*

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



22%


Which of the following best characterizes the type of company you work for?

(Please select only one option.)

- ☐ **Media Agency** – your company advises clients on their media/marketing strategies and/or how to spend their advertising funds
- ☐ **Full Service Agency** – your company handles both Creative and Media strategy and/or execution
- ☐ **Creative Agency** – your company designs or produces marketing content and/or advises clients on their creative media/marketing strategies
- ☐ **Products/Services Business** – your company sells products or services and advertises/markets its products or services
- ☐ **Other** *(please describe):*

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



26%

Which of the following, if any, best characterizes the market sector/industry your company is in?
(Please select only one option.)

☐ Advertising or Marketing

☐ Apparel/Fashion

☐ Automotive

☐ B2B/Services for Businesses

☐ Consumer Electronics

☐ Education

☐ Financial Products/Services for Consumers (including Fintech)

☐ Food and Beverage

☐ Government

☐ Health and Beauty Products

☐ Home Products/Appliances

☐ Health Care or Medical Services

☐ Media and Entertainment

☐ Non-Profit

☐ Pharmaceuticals and Remedies (Rx or OTC)

☐ Restaurants

☐ Retail (including Ecommerce)

☐ Telecommunications

☐ Travel and Hospitality

☐ Other *(Please describe):*

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



29%

Which of the following best characterizes your current job title/level?

(Please select only one option.)

- ☐ Analyst
- ☐ Manager
- ☐ Vice President, SVP, EVP, President, etc.
- ☐ C-Level (CEO, COO, CMO, etc.)
- ☐ Buyer
- ☐ Planner
- ☐ Strategist
- ☐ Associate
- ☐ Director
- ☐ Supervisor/Department Head/Group Manager
- ☐ Other *(please describe):*

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



33%

Approximately how much did your company spend in the last 12 months on all advertising, including all digital types (e.g., display, video, audio, social) plus all non-digital types (e.g., TV types, print, OOH, etc.)?

(Please select only one option.)

- ☐ Less than \$10,000
- ☐ \$10,000 to less than \$25,000
- ☐ \$25,000 to less than \$50,000
- ☐ \$50,000 to less than \$100,000
- ☐ \$100,000 to less than \$250,000
- ☐ \$250,000 to less than \$500,000
- ☐ \$500,000 to less than \$1 million
- ☐ \$1 million to less than \$3 million
- ☐ \$3 million to less than \$7 million
- ☐ \$7 million to less than \$15 million
- ☐ \$15 million to less than \$30 million
- ☐ \$30 million to less than \$50 million
- ☐ \$50 million to less than \$100 million
- ☐ \$100 million to less than \$250 million
- ☐ \$250 million to less than \$500 million
- ☐ \$500 million or more
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



37%

Please think about your total advertising budget. In the past year, what percentage of your total advertising budget was used for **digital (online) advertising**, as opposed to **offline advertising**? Please give your best estimate.

(Please enter a number from 0 to 100 for each type of advertising or select "Don't know/Unsure." Values must add up to 100%)

Percentage of budget spent on offline advertising last year:	<input type="text"/> %
Percentage of budget spent on digital (online) advertising last year:	<input type="text"/> %
Don't know/Unsure	<input type="checkbox"/>
Total: 0 %	

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



40%


Which of the following types of **digital advertising**, if any, have you used in the past year? Please review the description of each advertising type **carefully**.

(Please select all that apply.)

- ☐ **Search** (Digital ads placed on search engine result pages. Ads generally consist of a headline, description, and a link to the destination URL.)
- ☐ **Connected TV** (Includes digital advertising that appears on home screens of CTV devices and in-stream video ads that appear on CTVs from platforms like Hulu, Roku and YouTube. CTVs are TV sets connected to the internet through built-in internet capability or through another device such as a Blu-ray player, game console, set-top box (e.g., Apple TV, Google Chromecast, Roku), etc.)
- ☐ **Social** (Digital ads placed on social media platforms such as Facebook, Instagram, LinkedIn, Snapchat, and Twitter.)
- ☐ **App/In-App** (Digital ads placed and displayed within mobile apps. Does not include ads placed on social media platforms.)
- ☐ **Display** (Digital ads made up of text, image, video, and/or other multimedia components that typically appear along the top or sides of a website, or sometimes in the middle of other content on a website. Examples of display ad formats include banner ads, animations, and interactive content. Display ads do not include ads placed on social media platforms.)
- ☐ **eCommerce Platforms** (Digital ads that appear on eCommerce platforms, such as Amazon.com or Instacart.)
- ☐ **Email** (Digital ads sent via email to current and potential customers.)
- ☐ **Digital Video** (Includes video ads that appear before, during, or after digital content in a video player, such as YouTube.)
- ☐ **Digital Audio** (Recorded advertisements that play between or during songs, podcasts, or other digital audio content.)
- ☐ **Other** (specify and explain):
- ☐ **Don't know/Unsure**

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



44%

In which of the following ways have you personally been involved in your company's **digital display** advertising efforts in the **last 12 months**?

(Select all that apply.)

- ☐ I determine which tools and/or platforms to use for digital display.
- ☐ I regularly set up audience/target parameters for digital display campaigns.
- ☐ I regularly use self-serve ad platforms to manage digital display campaigns.
- ☐ I oversee a team/individuals that use(s) self-serve ad platforms to manage digital display campaigns.
- ☐ I measure results of digital display campaigns.
- ☐ I determine overall strategies and/or budgets for digital display.
- ☐ None of the above
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



48%

This question is testing whether or not you're paying attention while taking this survey. Please select "Somewhat likely" below.

(Please select only one option.)

- ☐ Not at all likely
- ☐ Not likely
- ☐ Neither unlikely nor likely
- ☐ Somewhat likely
- ☐ Very likely
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

MAIN QUESTIONNAIRE



52%

You have been selected to answer questions about advertising practices you have used. For each question, if you don't know or are unsure, please don't guess. Simply indicate this in your response by selecting the "Don't know/Unsure" option. There are no right or wrong answers.

Also, you should complete this survey without stopping in the middle. Please make sure not to consult anyone; use your browser's "Back" button; or open another browser while working on this survey.

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



55%


Do you or do you not use an ad agency and/or a consultant for digital advertising?

(Please select one option.)

- ☐ Yes, I use an ad agency and/or a consultant for digital advertising
- ☐ No, I do **not** use an ad agency and/or a consultant for digital advertising
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER




59%

For which, if any, of the following do you use an ad agency and/or a consultant?
(Please select all that apply.)

- ☐ Content and/or creatives
- ☐ Budgeting decisions
- ☐ Media/marketing strategies
- ☐ Customer research
- ☐ Implementation of advertising (e.g., placing bids, interacting with DSPs)
- ☐ Allocating advertising funds across advertising types
- ☐ Consulting services
- ☐ Running advertising tests/experiments
- ☐ Tracking advertising performance
- ☐ Inventory access
- ☐ Other *(specify):*
- ☐ None of the above
- ☐ Don't know/Unsure

Continue »

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61%

You mentioned that you have used **digital display advertising** in the **last 12 months**.

Digital display ads are digital ads made up of text, image, video and/or other multimedia components that typically appear along the top or sides of a website, or sometimes in the middle of other content on a website. Examples of display ad formats include banner ads, animations, and interactive content. Display ads do not include ads placed on social media platforms.

Which of the following platforms, if any, have you used during the **last 12 months** for **digital display advertising**?

(Please select all that apply.)

☐ Google Ads

☐ Google Display and Video 360 (DV360)

☐ Criteo

☐ Quantcast

☐ MediaMath

☐ Amazon DSP

☐ The Trade Desk

☐ Amobee

☐ Adobe Advertising Cloud

☐ Yahoo DSP (formerly Verizon Media)


☐ Ad Step Technologies

☐ Other *(please specify)*:

☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



64%

You indicated that you have used **social advertising** in the **last 12 months**.

Social ads are digital ads placed on social media platforms such as Facebook, Instagram, LinkedIn, Snapchat, and Twitter.

Which of the following platforms, if any, have you used during the **last 12 months** for **social advertising**?
(Please select all that apply.)

☐ Twitter

☐ TikTok

☐ Reddit

☐ Snapchat

☐ Tumblr

☐ Instagram

☐ Pinterest

☐ FriendLinx

☐ Facebook

☐ LinkedIn

☐ Other social media platforms (*specify*):

☐ Don't know/Unsure

Continue »

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66%


What factors do you consider when deciding where to buy **digital ads** from?

(Please type your response in the text box below, or select "Don't know/Unsure".)

☐ Don't know/Unsure

Continue »

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**AD PROS™**
ADVERTISER PERCEPTIONS

69%

In addition to the factors you just mentioned, what other factors, if any, do you consider when deciding where to buy **digital ads** from?

☐ Don't know/Unsure

Continue »

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72%

The following questions pertain to **digital advertising**.

Previously, you mentioned that you have used the following types of **digital advertising** in the past year. What is your best estimate of the share of your **digital advertising spending** that was used for each of these types of advertising in the past year? Specifically, please allocate 100% across the different types of digital advertising shown below based on the share of your total digital advertising spending on each type. The total should add up to 100%.

To review the advertising type descriptions, hover your mouse over each digital advertising type.

(Please enter a number from 0 to 100 in each cell, or select "Don't know/Unsure." Please make sure that numbers add up to 100.)

Search	<input type="text"/> %
Social	<input type="text"/> %
Display	<input type="text"/> %
Don't know/Unsure	<input type="checkbox"/>
Total: 0 %	

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



76%


Please read carefully. Now suppose that, based on your analysis, the cost of display advertising has recently increased by a small but significant amount, and will remain elevated for the foreseeable future. Assume further that, based on similar analyses for other digital advertising types, the **costs of other digital advertising types** have not changed and are not expected to change.

So, if the cost of display advertising increases (while the cost of other advertising types remains the same), will you or won't you divert some of your advertising spending for the coming year to other types of digital advertising?

- ☐ Yes, I will divert some of my advertising spending for the coming year to other types of digital advertising
- ☐ No, I will **not** divert any of my advertising spending for the coming year to other types of digital advertising
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



80%

To which other types of digital advertising below, if any, would you divert your advertising spending for the coming year as a result of the increase in the cost of display advertising?

To review the advertising type descriptions, hover your mouse over each digital advertising type.
(Please select all that apply.)

- ☐ Search
- ☐ eCommerce Platforms
- ☐ App/In-App
- ☐ Digital Video
- ☐ Email
- ☐ Digital Audio
- ☐ Connected TV
- ☐ Social
- ☐ Other
- ☐ None of the above
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



81%

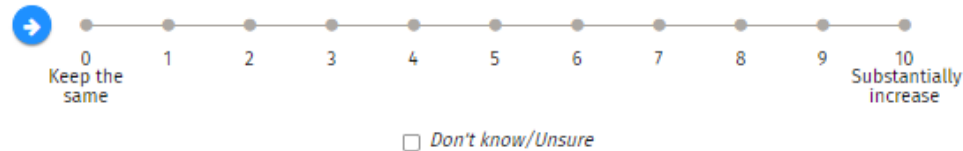
In your previous answer, you indicated that the increase in the cost of display advertising will lead you to divert some of your advertising spending to the types of digital advertising listed below.

Please use the sliders below to indicate, on a scale of **0** to **10**, the extent to which you would divert (that is, increase) advertising spending for the coming year to **each type of digital advertising** that you just indicated.

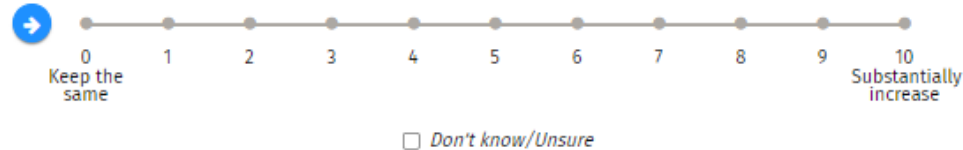
For each digital advertising type below, please select **0** if you expect to keep spending on that type of digital advertising for the coming year and **10** if you expect to substantially increase spending on that type of digital advertising.

To review the advertising type descriptions, hover your mouse over each digital advertising type.

Search



Social



Continue »

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83%

Which of the following metrics, if any, are you using to assess the performance of **display ads** and/or **social media ads**?


To review the advertising type descriptions, hover your mouse over each digital advertising type.

(Please select all that apply in each column.)

	Social media ads	Display ads
Click through rate (CTR)	<input type="checkbox"/>	<input type="checkbox"/>
Cost per click (CPC)	<input type="checkbox"/>	<input type="checkbox"/>
Conversions	<input type="checkbox"/>	<input type="checkbox"/>
Return on Ad Spend (ROAS)	<input type="checkbox"/>	<input type="checkbox"/>
Cost per impression (CPM)	<input type="checkbox"/>	<input type="checkbox"/>
Impressions	<input type="checkbox"/>	<input type="checkbox"/>
Clicks	<input type="checkbox"/>	<input type="checkbox"/>
Cost per action (CPA)	<input type="checkbox"/>	<input type="checkbox"/>
Return on Investment (ROI)	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify): <input type="text"/>		<input type="checkbox"/>
Other (please specify): <input type="text"/>	<input type="checkbox"/>	
None of the above	<input type="checkbox"/>	<input type="checkbox"/>
Don't know/Unsure	<input type="checkbox"/>	<input type="checkbox"/>

Continue »

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85%

The following questions pertain to **digital display advertising**.

You indicated that you use the following metrics to assess the performance of **digital display ads**. Please rank these metrics in terms of **how important they are to accurately assessing the performance of digital display ads**, with 1 being the most important and 2 being the least important.

(Please rank the following metrics, or select "Don't know/Unsure".)

Return on Ad Spend (ROAS)

Impressions

Rank 1

Rank 2

Don't know/Unsure

Continue »

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87%

How often, if at all, do you assess the performance of your **digital display advertising**?


(Please select only one option.)

If you are using an ad agency and/or a consultant and they are responsible for measuring or assessing performance of your display advertising, please indicate how often you receive information about the performance of your **digital display advertising** from the agency.

- ☐ Daily
- ☐ Weekly
- ☐ Monthly
- ☐ Quarterly
- ☐ Annually
- ☐ Don't know/Unsure

Continue »

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91%

In the past year, have you run any experiments or test & learn initiatives on your **digital display ads**?

(Please select only one option.)

☐ No

☐ Yes

☐ Don't know/Unsure

Continue »

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94%

Which of the following types of experiments or test & learn initiatives, if any, have you run in the past year on your **digital display ads**?

I have run experiments and/or test & learn initiatives testing...

(Please select all that apply.)

- ☐ Bid strategies
- ☐ Creatives
- ☐ Publishers
- ☐ ROI/ROAS
- ☐ Ad buying tool performance
- ☐ Audiences
- ☐ Other *(please specify)*:
- ☐ Don't know/Unsure

Continue »

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FOLLOW UP QUESTION



96%

This survey is being conducted by consultants that have been retained on behalf of Google in connection with pending antitrust lawsuits in which the plaintiffs allege that Google engaged in anticompetitive conduct related to digital advertising.

If you are willing to participate in this survey, please click “Include my responses” below. As a reminder, your responses will be kept anonymous and will be analyzed as part of a larger sample of responses.

If you do not want to participate in this survey, please click “Exclude my responses” below.

☐ Exclude my responses

☐ Include my responses

Continue »

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Thank you for taking our survey. Your efforts are greatly appreciated!

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APPENDIX G.3 LOWER-SPEND ADVERTISER SURVEY RAW DATA

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PRODUCED AS NATIVE

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

APPENDIX H

AGENCY SURVEY

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APPENDIX H.1 AGENCY SURVEY SCRIPT

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**Agency Survey
Screener and Main Survey Programmer Instructions**

LEGEND:

[PROGRAMMER NOTES IN BOLD CAPS AND BRACKETS]

Notes to respondent in italics

FORMAT: The survey consists of the following sections:

Introduction & Screening (questions labeled QS)
Main Survey Questions (questions labeled Q)
Follow-Up Questions (questions labeled QF)

Overview

[NO RESPONDENTS TO BE CONTACTED AT COMPANIES FROM THE LIST OF ENTITIES TO BE EXCLUDED]

[PANEL CONSISTS OF RESPONDENTS WHO ARE 18+, BASED IN THE U.S., WORK FOR AN ADVERTISING AGENCY, AND WHOSE JOB FUNCTION RELATES TO MARKETING AND/OR ADVERTISING]

[TARGET 400 COMPLETES]

[DISABLE THE BROWSER’S “BACK” BUTTON AND DO NOT SHOW A “BACK” BUTTON WITHIN THE SURVEY]

[FORCE RESPONSES TO ANSWER ALL QUESTIONS UNLESS OTHERWISE SPECIFIED]

[DISPLAY ONE QUESTION PER PAGE UNLESS OTHERWISE SPECIFIED]

[NO SURVEY OR SECTION TITLES TO BE DISPLAYED TO RESPONDENTS]

[DIGITAL FINGERPRINTING SHOULD BE USED TO AVOID REPEAT PARTICIPATION]

[TEXT FOR TERMINATES: “THANK YOU FOR YOUR INTEREST IN OUR STUDY. YOU DO NOT QUALIFY FOR THIS STUDY. WE APPRECIATE YOUR TIME.”]

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Introduction and Screening

QS1. Please enter the code exactly as it appears in the box below, and then click “Continue” to continue.

[INSERT CAPTCHA; TERMINATE AFTER THREE INCORRECT ATTEMPTS]

QS2. Thank you for participating in our study. Your opinions are very important to us. If you don’t know an answer to a question or if you don’t have an opinion, please don’t guess. Simply indicate this in your response by selecting the “Don’t know / Unsure” option. There are no right or wrong answers.

Your responses will be kept anonymous and will be analyzed as part of a larger sample of responses. The results of this study will not be used to try to sell you anything.

If you wear glasses or corrective lenses when using a desktop computer, laptop computer, or tablet, please wear them throughout the survey.

Please do not use the “Back” button of your browser while taking the survey. When you are ready to get started, please select the “Continue” button.

QS3. What is your age? *(Please select only one option.)*

[FLIP ORDER PER RESPONDENT, AS IS AND REVERSE; KEEP “PREFER NOT TO ANSWER” LAST]

- ☐ Under 18 **[TERMINATE]**
- ☐ 18 - 34
- ☐ 35 - 49
- ☐ 50 - 64
- ☐ 65 or above
- ☐ Prefer not to answer **[TERMINATE]**

QS4. What is your gender? *(Please select only one option.)*

[RANDOMIZE; KEEP “OTHER” AND “PREFER NOT TO ANSWER” LAST]

- ☐ Male
- ☐ Female
- ☐ Other: **[INSERT TEXT BOX]**
- ☐ Prefer not to answer

QS5. In which state do you live? *(Please select only one option.)*

[INSERT DROP DOWN MENU OF ALL 50 STATES AND DC, PLUS “OTHER” AND “DON’T KNOW / UNSURE”]

[TERMINATE IF “OTHER” OR “DON’T KNOW / UNSURE” IS SELECTED]

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QS6. Which of the following do you have any involvement in as part of your job responsibilities? *(Please select all that apply.)*

[RANDOMIZE; KEEP “OTHER” LAST]

- ☐ Hiring/HR
- ☐ IT/Tech
- ☐ Business intelligence/Data science
- ☐ Sales or account management
- ☐ Accounting/Finance
- ☐ Advertising or Marketing
- ☐ Website/Mobile App design/development
- ☐ Customer relationship management
- ☐ Data analysis/statistics
- ☐ Other *(specify)*:

[TERMINATE IF “Advertising or Marketing” IS NOT SELECTED]

QS7. Which of the following best characterizes the type of company you work for? *(Please select only one option.)*

[RANDOMIZE; KEEP “OTHER” LAST]

- Ⓐ **Advertiser/Marketer** – your company sells products or services and advertises/markets its products or services **[TERMINATE]**
- Ⓑ **Creative Agency** – your company designs or produces marketing content and/or advises clients on their creative media/marketing strategies **[TERMINATE]**
- Ⓒ **Media Agency** – your company advises clients on their media/marketing strategies and/or how to spend their advertising funds
- Ⓓ **Full Service Agency** – your company handles both Creative and Media strategy and/or execution
- Ⓔ **Other** *(please describe)*: **[INSERT TEXT BOX] [TERMINATE]**

QS8. **[IF FULL SERVICE AGENCY SELECTED IN QS7]** You indicated that you work for a Full Service Agency. Does your work primarily involve Creative strategy (i.e., designing or producing marketing content and/or advising clients on creative strategies) or Media strategy (i.e., advising clients on media/marketing strategy and/or how to spend advertising funds)? *(Please select only one option.)*

[RANDOMIZE ORDER; KEEP “NONE OF THE ABOVE” AND “DON’T KNOW / UNSURE” LAST]

- Ⓐ Creative Strategy **[TERMINATE]**
- Ⓑ Media Strategy
- Ⓒ None of the above **[TERMINATE]**
- Ⓓ Don’t know / Unsure **[TERMINATE]**

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QS9. Which of the following best characterizes your current job title/level? (*Select only one option.*)

[RANDOMIZE; KEEP “OTHER” LAST]

- ☐ C-Level (CEO, CMO, COO, etc.)
- ☐ Account Manager / Account Executive
- ☐ Business Development Manager
- ☐ Media Planner
- ☐ Media Buyer
- ☐ Project Manager
- ☐ Social Media Manager
- ☐ Editor / Writer
- ☐ Analyst / Researcher
- ☐ Strategist
- ☐ Data Scientist / Data Analyst
- ☐ Traffic Manager
- ☐ Other (*please describe*): **[INSERT TEXT BOX]**

QS10. The following questions will ask you about your advertising decisions and practices. For these questions, please think about **the client you spend the most time on** and answer the question from the perspective of that client. If there are multiple clients you spend the most time on, please answer the following questions from the perspective of the most typical of those clients.

QS11. Which of the following, if any, best characterizes the market sector/industry of the client you spend the most time on? (*Please select only one option.*)

[DO NOT RANDOMIZE]

- ☐ Advertising or Marketing
- ☐ Apparel/Fashion
- ☐ Automotive
- ☐ B2B/Services for Businesses
- ☐ Consumer Electronics
- ☐ Education
- ☐ Financial Products/Services for Consumers (including Fintech)
- ☐ Food and Beverage
- ☐ Government
- ☐ Health and Beauty Products
- ☐ Home Products/Appliances
- ☐ Health Care or Medical Services
- ☐ Media and Entertainment
- ☐ Non-Profit
- ☐ Pharmaceuticals and Remedies (Rx or OTC)
- ☐ Restaurants
- ☐ Retail (including Ecommerce)
- ☐ Telecommunications
- ☐ Travel and Hospitality

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Ⓐ Other (*Please describe*): [INSERT TEXT BOX]

QS12. In the **last 12 months**, approximately how much did the client you spend the most time on spend on all advertising, including all digital types (e.g., display, video, audio, social) plus all nondigital types (e.g., TV types, print, OOH, etc.)? (*Please select only one option.*)

[FLIP ORDER PER RESPONDENT, AS IS AND REVERSE; KEEP “DON’T KNOW / UNSURE” LAST]

- Ⓐ Less than \$10,000
- Ⓑ \$10,000 to less than \$50,000
- Ⓒ \$50,000 to less than \$100,000
- Ⓓ \$100,000 to less than \$250,000
- Ⓔ \$250,000 to less than \$500,000
- Ⓕ \$500,000 to less than \$1 million
- Ⓖ \$1 million to less than \$3 million
- Ⓗ \$3 million to less than \$7 million
- Ⓘ \$7 million to less than \$15 million
- Ⓚ \$15 million to less than \$30 million
- Ⓛ \$30 million to less than \$50 million
- Ⓜ \$50 million to less than \$100 million
- Ⓟ \$100 million to less than \$250 million
- Ⓡ \$250 million to less than \$500 million
- Ⓢ \$500 million or more
- Ⓣ Don’t know / Unsure

QS13. Please think about the total advertising budget for the client you spend the most time on. In the past year, what percentage of the total advertising budget for the client you spend the most time on was used for **digital (online) advertising**, as opposed to **offline advertising**? Please give your best estimate. (*Please enter a number from 0 to 100 for each type of advertising or select “Don’t know / Unsure.” Values must add up to 100%.*)

[FOR ERRORS, DISPLAY THE FOLLOWING ERROR MESSAGE: “Please enter a whole number between 0 and 100 for each advertising type, or select “Don’t know / Unsure.” Values must add up to 100”][SHOW TOTAL AT BOTTOM]

Percentage of budget spent on **digital (online) advertising** last year:

Percentage of budget spent on **offline advertising** last year:

Ⓐ Don’t know / Unsure

[TERMINATE IF DIGITAL (ONLINE) = 0]

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QS14. Which of the following types of **digital advertising**, if any, have you used in the past year for the client you spend the most time on? Please review the description of each advertising type **carefully**. *(Please select all that apply.)*

[RANDOMIZE ORDER; KEEP “OTHER” AND “DON’T KNOW / UNSURE” LAST]

	Advertising Type	Description
<input type="checkbox"/>	Search	Digital ads placed on search engine result pages. Ads generally consist of a headline, description, and a link to the destination URL.
<input type="checkbox"/>	Display	Digital ads made up of text, image, video, and/or other multimedia components that typically appear along the top or sides of a website, or sometimes in the middle of other content on a website. Examples of display ad formats include banner ads, animations, and interactive content. Display ads do not include ads placed on social media platforms.
<input type="checkbox"/>	Email	Digital ads sent via email to current and potential customers.
<input type="checkbox"/>	Digital Audio	Recorded advertisements that play between or during songs, podcasts, or other digital audio content.
<input type="checkbox"/>	Social	Digital ads placed on social media platforms such as Facebook, Instagram, LinkedIn, Snapchat, and Twitter.
<input type="checkbox"/>	App/In-App	Digital ads placed and displayed within mobile apps. Does not include ads placed on social media platforms.
<input type="checkbox"/>	Digital Video	Includes video ads that appear before, during, or after digital content in a video player, such as YouTube.
<input type="checkbox"/>	Connected TV	Includes digital advertising that appears on home screens of CTV devices and in-stream video ads that appear on CTVs from platforms like Hulu, Roku and YouTube. CTVs are TV sets connected to the internet through built-in internet capability or through another device such as a Blu-ray player, game console, set-top box (e.g., Apple TV, Google Chromecast, Roku), etc.
<input type="checkbox"/>	eCommerce Platforms	Digital ads that appear on eCommerce platforms, such as Amazon.com or Instacart.
<input type="checkbox"/>	Other <i>(specify and explain)</i> : [INSERT TEXT BOX]	
<input checked="" type="radio"/> Don't know / Unsure [EXCLUSIVE]		

[TERMINATE IF “DISPLAY” IS NOT SELECTED]

QS15. You indicated that you have used **display advertising** in the past year for the client you spend the most time on. Display ad inventory can be purchased through programmatic

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transaction methods or through direct deals with publishers. Please review the below descriptions about these transaction methods.

Programmatic: Ads that are purchased programmatically are transacted and fulfilled using automation. In programmatic transactions, the price of each impression is typically determined in an auction conducted automatically before the impression is served.

Direct Deals: Ads that are purchased through a direct negotiation, or “direct deal,” with the publisher. In direct deals, the price of the ad inventory is typically set through a one-to-one negotiation between the advertiser and the publisher rather than through an auction. “Direct deals” include programmatic direct deals, such as programmatic guaranteed deals and preferred deals.

Which of the following transaction methods have you used to purchase **display ad inventory** in the past year for the client you spend the most time on? *(Please select all that apply.)*

[RANDOMIZE ORDER; KEEP “NONE OF THE ABOVE” AND “DON’T KNOW / UNSURE” LAST]

- ☐ Programmatic
- ☐ Direct Deals
- ☒ None of the above **[EXCLUSIVE]**
- ☒ Don’t know / Unsure **[EXCLUSIVE]**

[TERMINATE IF “PROGRAMMATIC” IS NOT SELECTED]

QS16. **[IF “SOCIAL” IS SELECTED IN QS14]** You indicated that you have used **social advertising** in the past year for the client you spend the most time on. Which of the following social media platforms, if any, have you used in the past year for the client you spend the most time on? *(Please select all that apply.)*

[RANDOMIZE ORDER; KEEP “OTHER,” “NONE OF THE ABOVE”, AND “DON’T KNOW / UNSURE” LAST]

- ☐ Facebook
- ☐ Instagram
- ☐ Pinterest
- ☐ Snapchat
- ☐ TikTok
- ☐ Twitter
- ☐ LinkedIn
- ☐ Reddit
- ☐ Tumblr
- ☐ FriendLinx
- ☐ Other social media platforms *(specify)*: **[INSERT TEXT BOX]**
- ☒ None of the above **[EXCLUSIVE]**

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☐ Don't know / Unsure [EXCLUSIVE]

QS17. In the **last 12 months**, in which of the following ways have you personally been involved in **digital display** advertising efforts on behalf of the client you spend the most time on? (*Select all that apply.*)

[RANDOMIZE; KEEP “NONE OF THE ABOVE” AND “DON’T KNOW / UNSURE” LAST]

- ☐ I determine or advise the client regarding overall strategies and/or budgets for digital display.
- ☐ I determine or advise the client regarding which buying tools and/or demand-side platforms (DSPs) to use for digital display.
- ☐ I regularly use self-serve ad platforms to manage digital display campaigns for the client.
- ☐ I oversee a team/individuals that use(s) self-serve ad platforms to manage digital display campaigns for the client.
- ☐ I regularly set up audience/target parameters for programmatic digital display buying for the client.
- ☐ I oversee a team/individuals that set(s) up audience/target parameters for programmatic digital display buying for the client.
- ☐ I measure results of digital display campaigns for the client.
- ☐ I oversee a team/individuals that measure(s) results of digital display campaigns for the client.
- ☐ None of the above [EXCLUSIVE] [TERMINATE]
- ☐ Don't know / Unsure [EXCLUSIVE] [TERMINATE]

[TERMINATE IF NONE OF “I determine or advise the client regarding overall strategies and/or budgets for digital display”, “I determine or advise the client regarding which buying tools and/or demand-side platforms (DSPs) to use for digital display”, “I regularly use self-serve ad platforms to manage digital display campaigns for the client”, and “I oversee a team/individuals that use(s) self-serve ad platforms to manage digital display campaigns for the client” ARE SELECTED]

QS18. This question is testing whether or not you're paying attention while taking this survey. Please select “Somewhat likely” below. (*Please select only one option.*)

[FLIP ORDER PER RESPONDENT, AS IS AND REVERSE; KEEP “DON’T KNOW / UNSURE” LAST]

- ☐ Not at all likely [TERMINATE]
- ☐ Not likely [TERMINATE]
- ☐ Neither unlikely nor likely [TERMINATE]
- ☐ Somewhat likely
- ☐ Very likely [TERMINATE]
- ☐ Don't know / Unsure [TERMINATE]

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Main Questionnaire

- Q1. You have been selected to answer additional questions about your advertising practices for **the client you spend the most time on**. Please continue to think about the client you spend the most time on and answer the question from the perspective of that client. If there are multiple clients you spend the most time on, please answer the following questions from the perspective of the most typical of those clients.

For each question, if you don't know or are unsure, please don't guess. Simply indicate this in your response by selecting the "Don't know / Unsure" option. There are no right or wrong answers.

Also, you should complete this survey without stopping in the middle. Please make sure not to consult anyone; use your browser's "Back" button; or open another browser while working on this survey.

Relative Roles of Agency vs. the Client

- Q2. Which of the following best describes your involvement in each of these activities for the client you spend the most time on? *(Please select a value on the slider between 0 and 100 for each activity. If you do not have an answer, please select "Don't know / Unsure".)*

[SHOW SLIDER FOR EACH ROW FROM 0 TO 100, LABEL "I AM NOT INVOLVED IN THESE DECISIONS" 0 AND "I AM THE PRIMARY DECISION-MAKER" 100. INCLUDE OPTION FOR "DON'T KNOW / UNSURE"]

[RANDOMIZE ORDER OF ROWS]

Determining initial advertising budget
Allocating budget across different advertising types
Increasing/decreasing spending on a particular type of advertising
Increasing/decreasing spending on a particular ad campaign
Making changes to a campaign based on its performance
Deciding where to advertise
Deciding whether to purchase display ads programmatically or through direct deals with publishers
Measuring performance of display ad campaigns

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Budget Allocation and Substitution

Q3. The following questions pertain to **digital advertising**.

Previously, you mentioned that the client you spend the most time on has used the following types of **digital advertising** in the past year. What is your best estimate of the share of the **digital advertising** budget of the client you spend the most time on that was used for each of these types of advertising in the past year? Specifically, please allocate 100% across the different types of digital advertising shown below based on the share of your client's total digital advertising budget spent on each type. The total should add up to 100%.

To review the advertising type descriptions, hover your mouse over each digital advertising type.

(Please enter a number from 0 to 100 in each cell, or select "Don't know / Unsure." Please make sure that numbers add up to 100.)

[SHOW ALL ANSWER OPTIONS SELECTED IN QS14 AND QS15 WITH TEXT BOX REQUIRING WHOLE NUMBER BETWEEN 0 AND 100. RANDOMIZE ORDER; KEEP "OTHER" AND "DON'T KNOW / UNSURE" LAST. SHOW RUNNING TOTAL AT THE BOTTOM OF THE PAGE WITH THE SUM OF THE NUMBERS ENTERED]

[DISPLAY DESCRIPTIONS FROM QS14 AND QS15 WHEN RESPONDENT HOVERS OVER TYPE OF ADVERTISING]

[THE SUM OF ALL NUMBERS MUST EQUAL 100. IF RESPONDENT CLICKS "NEXT" AND THE SUM OF THE NUMBERS IS NOT EQUAL TO 100, SHOW THE FOLLOWING ERROR MESSAGE: "Sorry, your answers do not add up to 100. Please try again."]

[FOR ALL OTHER ERRORS, DISPLAY THE FOLLOWING ERROR MESSAGE: "Please specify a whole number in each cell, and do not leave any cell blank. Please enter 0 if you do not spend any portion of your advertising budget on a type of advertising."]

Search:	<input type="text"/>
Programmatic Display:	<input type="text"/>
Direct Deals Display:	<input type="text"/>
Email:	<input type="text"/>
Digital Audio:	<input type="text"/>
Social:	<input type="text"/>
App/In-app:	<input type="text"/>
Digital Video:	<input type="text"/>

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Connected TV:

eCommerce Platforms:

Other

TOTAL

**[SHOW SUM OF NUMBERS
ABOVE]**

☐ Don't know / Unsure **[EXCLUSIVE]**

- Q4. Please read carefully. Now suppose that, based on your analysis, the cost of **programmatic display advertising** has **recently increased by a small but significant amount, and will remain elevated for the foreseeable future**. Assume further that, based on similar analyses for other digital advertising types, the **costs of other digital advertising types** have **not** changed and are not expected to change.

So, for **the client you spend the most time on**, if the cost of programmatic display advertising increases (while the cost of other advertising types remains the same), will you or won't you divert some of your advertising spending for the coming year to other types of digital advertising?

[FLIP ORDER PER RESPONDENT, AS IS AND REVERSE; KEEP “DON'T KNOW / UNSURE” LAST]

- ☐ Yes, I will divert some of my advertising spending for the coming year to other types of digital advertising.
 - ☐ No, I will **not** divert any of my advertising spending for the coming year to other types of digital advertising. **[SKIP TO Q7]**
 - ☐ Don't know / Unsure **[SKIP TO Q7]**
- Q5. To which other types of digital advertising below, if any, would you divert your advertising spending for the coming year for **the client you spend the most time on**, as a result of the **increase in the cost of programmatic display advertising**?

To review the advertising type descriptions, hover your mouse over each digital advertising type.

(Please select all that apply.)

[DISPLAY DESCRIPTIONS FROM QS14 AND QS15 WHEN RESPONDENT HOVERS OVER TYPE OF ADVERTISING. RANDOMIZE ORDER; KEEP “OTHER,” “NONE OF THE ABOVE,” AND “DON'T KNOW / UNSURE” LAST]

- ☐ Search
- ☐ Direct Deals Display
- ☐ Email
- ☐ Digital Audio
- ☐ Social
- ☐ App/In-App

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

- ☐ Digital Video
- ☐ Connected TV
- ☐ eCommerce Platforms
- ☐ Other
- ☐ None of the above [EXCLUSIVE] [SKIP TO Q7]
- ☐ Don't know / Unsure [EXCLUSIVE] [SKIP TO Q7]

Q6. In your previous answer, you indicated that the increase in the cost of programmatic display advertising will lead you to divert some of your advertising spending to the types of digital advertising listed below.

Please use the sliders below to indicate, on a scale of **0** to **10**, the extent to which you would divert (that is, increase) advertising spending for the coming year for **the client you spend the most time on to each type of digital advertising** that you just indicated.

For each digital advertising type below, please select **0** if you expect to keep spending on that type of digital advertising for the coming year and **10** if you expect to substantially increase spending on that type of digital advertising.

To review the advertising type descriptions, hover your mouse over each digital advertising type.

[SHOW ANSWER OPTIONS SELECTED IN Q5. MATCH ORDER OF RESPONSES TO Q5. FOR EACH ADVERTISING TYPE, SHOW SLIDER FROM 0 TO 10, LABEL 0 “KEEP THE SAME” AND 10 “SUBSTANTIALLY INCREASE.” INCLUDE OPTION FOR “DON’T KNOW / UNSURE”.]

[DISPLAY DESCRIPTIONS FROM QS14 AND QS15 WHEN RESPONDENT HOVERS OVER TYPE OF ADVERTISING]

Search	[INSERT SLIDER]	<input type="radio"/> Don't know / Unsure
Direct Deals Display	[INSERT SLIDER]	<input type="radio"/> Don't know / Unsure
Email	[INSERT SLIDER]	<input type="radio"/> Don't know / Unsure
Digital Audio	[INSERT SLIDER]	<input type="radio"/> Don't know / Unsure
Social	[INSERT SLIDER]	<input type="radio"/> Don't know / Unsure
App/In-app	[INSERT SLIDER]	<input type="radio"/> Don't know / Unsure
Digital Video	[INSERT SLIDER]	<input type="radio"/> Don't know / Unsure
Connected TV	[INSERT SLIDER]	<input type="radio"/> Don't know / Unsure
eCommerce Platforms	[INSERT SLIDER]	<input type="radio"/> Don't know / Unsure
Other	[INSERT SLIDER]	<input type="radio"/> Don't know / Unsure

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Use of Ad Buying Tools for Programmatic Display (Multihoming)

Q7. An ad buying tool is a programmatic advertising platform that allows advertisers and media buying agencies to bid automatically on display ad inventory from a wide range of publishers. Some ad buying tools can also be used to buy video and search ad inventory. Ad buying tools include demand side platforms, or “DSPs.”

Which of the following ad buying tools, if any, have you used in the **past year** for **programmatic display advertising** for the client you spend the most time on? *(Please select all that apply.)*

[RANDOMIZE ORDER; KEEP “OTHER” AND “DON’T KNOW / UNSURE” LAST]

- ☐ Google Ads
- ☐ Google Display and Video 360 (DV360)
- ☐ illumin (formerly AcuityAds)
- ☐ Adelphic
- ☐ Adform
- ☐ Adobe Advertising Cloud
- ☐ Amazon DSP
- ☐ Amobee
- ☐ Basis by Centro
- ☐ Beeswax
- ☐ Criteo
- ☐ MediaMath DSP
- ☐ Outbrain
- ☐ Quantcast
- ☐ Simpli.fi
- ☐ StackAdapt
- ☐ Taboola
- ☐ The Trade Desk DSP
- ☐ Yahoo DSP (formerly Verizon Media DSP)
- ☐ Xandr Invest
- ☐ Zeta Global
- ☐ Quorexx
- ☐ Ad Step Technologies
- ☐ Other *(please specify)*: [TEXT BOX]
- ☒ Don’t know / Unsure [EXCLUSIVE] [SKIP TO Q16]

[ADD FOLLOWING TEXT AS HOVER OVER FOR ALL INSTANCES OF “AD BUYING TOOL” IN FOLLOWING QUESTIONS: An ad buying tool is a programmatic advertising platform that allows advertisers and media buying agencies to bid automatically on display ad inventory from a wide range of publishers. Some ad buying tools can also be used to buy video and search ad inventory. Ad buying tools include demand side platforms, or “DSPs.”]

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

- Q8. **[IF MORE THAN ONE AD BUYING TOOL IS SELECTED IN Q7]** Why did you use more than one ad buying tool for **programmatic display advertising** in the past year for the client you spend the most time on? *(Please type in your response, or select “Don’t know / Unsure”.)*

[INSERT TEXT BOX]

[REQUIRE AT LEAST 4 CHARACTERS; IF ENTRY IS LESS THAN 4 CHARACTERS, SHOW ERROR “Please be thorough in your response.”]

☐ Don’t know / Unsure **[EXCLUSIVE]**

- Q9. Do you expect to use the same number, more, or fewer ad buying tools for **programmatic display advertising** next year for the client you spend the most time on? *(Please select only one option.)*

[RANDOMIZE ORDER; KEEP “DON’T KNOW / UNSURE” LAST]

- ☐ I expect to use **more** ad buying tools for programmatic display advertising next year for the client I spend the most time on.
- ☐ I expect to use **fewer** ad buying tools for programmatic display advertising next year for the client I spend the most time on.
- ☐ I expect to use the **same number** of ad buying tools for programmatic display advertising next year for the client I spend the most time on.
- ☐ Don’t know / Unsure

- Q10. **[IF MORE OR FEWER SELECTED IN Q9]** You indicated that, compared to the past year, you expect to use **[PIPE IN BASED ON ANSWER IN Q9: “more” or “fewer”]** ad buying tools for programmatic display advertising next year for the client you spend the most time on. Why do you expect to use **[PIPE IN BASED ON ANSWER IN Q9: “more” or “fewer”]** ad buying tools for programmatic display advertising next year for the client you spend the most time on? *(Please type in your response or select “Don’t know / Unsure”.)*

[INSERT TEXT BOX]

[REQUIRE AT LEAST 4 CHARACTERS; IF ENTRY IS LESS THAN 4 CHARACTERS, SHOW ERROR “Please be thorough in your response.”]

☐ Don’t know / Unsure **[EXCLUSIVE]**

- Q11. Which of the following factors, if any, do you consider when deciding to use a particular ad buying tool for **programmatic display advertising** for the client you spend the most time on? *(Please select all that apply.)*

[RANDOMIZE ORDER; KEEP “OTHER” AND “DON’T KNOW / UNSURE” LAST]

- ☐ Ad placement effectiveness
- ☐ Audience scale / Reach

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

- ☐ Ease of use / User interface
- ☐ Targeting criteria and capabilities
- ☐ Reporting features
- ☐ Forecasting tools
- ☐ Budget management tools
- ☐ API and integrations
- ☐ Troubleshooting capabilities
- ☐ Media optimization of placements during a campaign
- ☐ Brand safety / fraud protection
- ☐ Identity management
- ☐ Support
- ☐ Cost
- ☐ Other (*please specify*): [TEXT BOX]
- ☒ Don't know / Unsure [EXCLUSIVE]

Q12. Have you stopped using any ad buying tool(s) for **programmatic display advertising** in the **past year** for the client you spend the most time on? (*Please select only one option.*)

[RANDOMIZE ORDER AS IS AND REVERSE; KEEP “DON'T KNOW / UNSURE” LAST]

- ☒ Yes, I stopped using at least one ad buying tool in the past year for the client I spend the most time on.
- ☒ No, I have **not** stopped using any ad buying tools in the past year for the client I spend the most time on.
- ☒ Don't know / Unsure

Q13. [IF YES IN Q12] You indicated that you stopped using at least one ad buying tool in the **past year** for **programmatic display advertising** for the client you spend the most time on. What factors led you to stop using one or more ad buying tools for **programmatic display advertising** for the client you spend the most time on? (*Please type your response in the text box below, or select “Don't know / Unsure”.*)

[INSERT TEXT BOX]

[REQUIRE AT LEAST 4 CHARACTERS; IF ENTRY IS LESS THAN 4 CHARACTERS, SHOW ERROR “Please be thorough in your response.”]

- ☒ Don't know / Unsure [EXCLUSIVE]

Q14. Have you started using any ad buying tool(s) in the **past year** for **programmatic display advertising** for the client you spend the most time on? (*Please select only one option.*)

[RANDOMIZE ORDER AS IS AND REVERSE; KEEP “DON'T KNOW / UNSURE” LAST]

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

- ☐ Yes, I started using at least one ad buying tool in the past year for the client I spend the most time on.
- ☐ No, I have **not** started using any ad buying tools in the past year for the client I spend the most time on.
- ☐ Don't know / Unsure

Q15. **[IF YES IN Q14]** You indicated that you started using at least one ad buying tool in the **past year for programmatic display advertising** for the client you spend the most time on. What factors led you to start using one or more ad buying tools for **programmatic display advertising** for the client you spend the most time on? *(Please type your response in the text box below, or select "Don't know / Unsure".)*

[INSERT TEXT BOX]

[REQUIRE AT LEAST 4 CHARACTERS; IF ENTRY IS LESS THAN 4 CHARACTERS, SHOW ERROR "Please be thorough in your response."]

- ☐ Don't know / Unsure **[EXCLUSIVE]**

Measuring Performance

Q16. **[ONLY INCLUDE ADVERTISING TYPES SELECTED IN QS13 AND QS15]** Which of the following metrics, if any, do you use to assess the performance of **programmatic display ads, direct deals display ads, social media ads, and/or digital video ads** for the client you spend the most time on?

To review the advertising type descriptions, hover your mouse over each digital advertising type.

(Please select all that apply in each column.)

[DISPLAY DESCRIPTIONS FROM QS14 AND QS15 WHEN RESPONDENT HOVERS OVER TYPE OF ADVERTISING]

[RANDOMIZE ORDER OF ROWS, KEEP "OTHER," "NONE OF THE ABOVE," AND "DON'T KNOW / UNSURE" LAST. RANDOMIZE ORDER OF COLUMNS]

Metric	Programmatic display ads	Direct deals display ads	Social media ads	Digital video ads
Impressions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clicks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conversions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost per impression (CPM)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost per click (CPC)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost per action (CPA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Return on Ad Spend (ROAS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Return on Investment (ROI)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Click through rate (CTR)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify): [TEXT BOX]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
None of the above [EXCLUSIVE]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Don't know / Unsure [EXCLUSIVE]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q17. [ONLY IF MORE THAN ONE METRIC FOR PROGRAMMATIC DISPLAY ADS ARE SELECTED IN Q16] You indicated that you use the following metrics to assess the performance of **programmatic display ads** for the client you spend the most time on. Please rank these metrics in terms of **how important they are to accurately assessing the performance of programmatic display ads**, with 1 being the most important and [NUMBER OF MEASURES SELECTED IN Q16] being the least important. (Please rank the following metrics, or select “Don't know / Unsure”.)

[HAVE RESPONDENTS ASSIGN A RANK FROM 1 TO THE NUMBER OF RESPONSES SELECTED IN Q16 FOR EACH PERFORMANCE METRIC]

☐ Don't know / Unsure [EXCLUSIVE]

Q18. How often, if at all, do you measure or assess the performance of the **programmatic display advertising** for the client you spend the most time on? (Please select only one option.)

[RANDOMIZE ORDER AS IS AND REVERSE; KEEP “DON'T KNOW / UNSURE” LAST]

- ☐ Daily
- ☐ Weekly
- ☐ Monthly
- ☐ Quarterly
- ☐ Annually
- ☐ Don't know / Unsure

Q19. In the past year, have you run any experiments or test & learn initiatives to assess the performance of the **programmatic display ads** for the client you spend the most time on? (Please select only one option.)

[RANDOMIZE ORDER AS IS AND REVERSE; KEEP “DON'T KNOW / UNSURE” LAST]

- ☐ Yes
- ☐ No
- ☐ Don't know / Unsure

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Q20. **[IF YES IN Q19]** Which of the following types of experiments or test & learn initiatives, if any, have you run in the past year to assess the performance of the **programmatic display ads** for the client you spend the most time on?

I have run experiments and/or test & learn initiatives testing... *(Please select all that apply.)*

[RANDOMIZE ORDER; KEEP “OTHER” AND “DON’T KNOW / UNSURE” LAST]

- ☐ Creatives
- ☐ Bid strategies
- ☐ Audiences
- ☐ Publishers
- ☐ Ad buying tool performance
- ☐ ROI/ROAS
- ☐ Other *(please specify)*: **[TEXT BOX]**
- ☒ Don’t know / Unsure **[EXCLUSIVE]**

Follow Up Question

QF1. This survey is being conducted by consultants that have been retained on behalf of Google in connection with pending antitrust lawsuits in which the plaintiffs allege that Google engaged in anticompetitive conduct related to digital advertising.

If you are willing to participate in this survey, please click “Include my responses” below. As a reminder, your responses will be kept anonymous and will be analyzed as part of a larger sample of responses.

If you do not want to participate in this survey, please click “Exclude my responses” below.

[RANDOMIZE ORDER]

- ☒ Include my responses
- ☒ Exclude my responses

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

APPENDIX H.2 AGENCY SURVEY SCREENSHOTS

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

INTRODUCTION AND SCREENING



0%

Please enter the code exactly as it appears in the box below, and then click “Continue” to continue.

FKT98L

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



3%

Thank you for participating in our study. Your opinions are very important to us. If you don't know an answer to a question or if you don't have an opinion, please don't guess. Simply indicate this in your response by selecting the "Don't know/Unsure" option. There are no right or wrong answers.

Your responses will be kept anonymous and will be analyzed as part of a larger sample of responses. The results of this study will not be used to try to sell you anything.

If you wear glasses or corrective lenses when using a desktop computer, laptop computer, or tablet, please wear them throughout the survey.

Please do not use the "Back" button of your browser while taking the survey. When you are ready to get started, please select the "Continue" button.

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



6%

What is your age?

(Please select only one option.)

- ☐ Under 18
- ☐ 18 – 34
- ☐ 35 – 49
- ☐ 50 – 64
- ☐ 65 or above
- ☐ Prefer not to answer

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



9%


What is your gender?

(Please select only one option.)

- ☐ Female
- ☐ Male
- ☐ Other:
- ☐ Prefer not to answer

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



12%

In which state do you live?
(Please select only one option.)

Select one... ▼

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



15%

Which of the following do you have any involvement in as part of your job responsibilities?

(Please select all that apply.)

- ☐ Data analysis/statistics
- ☐ Accounting/Finance
- ☐ Customer relationship management
- ☐ Advertising or Marketing
- ☐ Website/Mobile App design/development
- ☐ Hiring/HR
- ☐ IT/Tech
- ☐ Sales or account management
- ☐ Business intelligence/Data science
- ☐ Other *(specify)*:

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



18%

Which of the following best characterizes the type of company you work for?

(Please select only one option.)

- ☐ **Full Service Agency** – your company handles both Creative and Media strategy and/or execution
- ☐ **Media Agency** – your company advises clients on their media/marketing strategies and/or how to spend their advertising funds
- ☐ **Creative Agency** – your company designs or produces marketing content and/or advises clients on their creative media/marketing strategies
- ☐ **Advertiser/Marketer** – your company sells products or services and advertises/markets its products or services
- ☐ **Other** *(please describe):*

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



22%

You indicated that you work for a Full Service Agency. Does your work primarily involve Creative strategy (i.e., designing or producing marketing content and/or advising clients on creative strategies) or Media strategy (i.e., advising clients on media/marketing strategy and/or how to spend advertising funds)?

(Please select only one option.)

- ☐ Creative Strategy
- ☐ Media Strategy
- ☐ None of the above
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



24%

Which of the following best characterizes your current job title/level?

(Please select only one option.)

- ☐ Media Planner
- ☐ Media Buyer
- ☐ Strategist
- ☐ Social Media Manager
- ☐ Data Scientist/Data Analyst
- ☐ Business Development Manager
- ☐ Account Manager/Account Executive
- ☐ Editor/Writer
- ☐ Project Manager
- ☐ Traffic Manager
- ☐ C-Level (CEO, CMO, COO, etc.)
- ☐ Analyst/Researcher
- ☐ Other *(please describe)*:

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER




26%

The following questions will ask you about your advertising decisions and practices. For these questions, please think about **the client you spend the most time on** and answer the question from the perspective of that client. If there are multiple clients you spend the most time on, please answer the following questions from the perspective of the most typical of those clients.

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



29%

Which of the following, if any, best characterizes the market sector/industry of the client you spend the most time on?
(Please select only one option.)

☐ Advertising or Marketing

☐ Apparel/Fashion

☐ Automotive

☐ B2B/Services for Businesses

☐ Consumer Electronics

☐ Education

☐ Financial Products/Services for Consumers (including Fintech)

☐ Food and Beverage

☐ Government

☐ Health and Beauty Products

☐ Home Products/Appliances

☐ Health Care or Medical Services

☐ Media and Entertainment

☐ Non-Profit

☐ Pharmaceuticals and Remedies (Rx or OTC)

☐ Restaurants

☐ Retail (including Ecommerce)

☐ Telecommunications

☐ Travel and Hospitality

☐ Other *(Please describe):*

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



33%

In the **last 12 months**, how much did the client you spend the most time on spend on all advertising, including all digital types (e.g., display, video, audio, social) plus all nondigital types (e.g., TV types, print, OOH, etc.)?

(Please select only one option.)

- ☐ Less than \$10,000
- ☐ \$10,000 to less than \$50,000
- ☐ \$50,000 to less than \$100,000
- ☐ \$100,000 to less than \$250,000
- ☐ \$250,000 to less than \$500,000
- ☐ \$500,000 to less than \$1 million
- ☐ \$1 million to less than \$3 million
- ☐ \$3 million to less than \$7 million
- ☐ \$7 million to less than \$15 million
- ☐ \$15 million to less than \$30 million
- ☐ \$30 million to less than \$50 million
- ☐ \$50 million to less than \$100 million
- ☐ \$100 million to less than \$250 million
- ☐ \$250 million to less than \$500 million
- ☐ \$500 million or more
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



36%

Please think about the total advertising budget for the client you spend the most time on. In the past year, what percentage of the total advertising budget for the client you spend the most time on was used for **digital (online) advertising**, as opposed to **offline advertising**? Please give your best estimate.

(Please enter a number from 0 to 100 for each type of advertising or select "Don't know/Unsure." Values must add up to 100%.)

Percentage of budget spent on digital (online) advertising last year:	<input type="text"/> %
Percentage of budget spent on offline advertising last year:	<input type="text"/> %
Don't know/Unsure	<input type="checkbox"/>
Total: 0 %	

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



39%

Which of the following types of **digital advertising**, if any, have you used in the past year for the client you spend the most time on? Please review the description of each advertising type **carefully**.

(Please select all that apply.)

- ☐ **Digital Audio** (Recorded advertisements that play between or during songs, podcasts, or other digital audio content.)
- ☐ **Connected TV** (Includes digital advertising that appears on home screens of CTV devices and in-stream video ads that appear on CTVs from platforms like Hulu, Roku and YouTube. CTVs are TV sets connected to the internet through built-in internet capability or through another device such as a Blu-ray player, game console, set-top box (e.g., Apple TV, Google Chromecast, Roku), etc.)
- ☐ **eCommerce Platforms** (Digital ads that appear on eCommerce platforms, such as Amazon.com or Instacart.)
- ☐ **Display** (Digital ads made up of text, image, video, and/or other multimedia components that typically appear along the top or sides of a website, or sometimes in the middle of other content on a website. Examples of display ad formats include banner ads, animations, and interactive content. Display ads do not include ads placed on social media platforms.)
- ☐ **Search** (Digital ads placed on search engine result pages. Ads generally consist of a headline, description, and a link to the destination URL.)
- ☐ **Email** (Digital ads sent via email to current and potential customers.)
- ☐ **Social** (Digital ads placed on social media platforms such as Facebook, Instagram, LinkedIn, Snapchat, and Twitter.)
- ☐ **App/In-App** (Digital ads placed and displayed within mobile apps. Does not include ads placed on social media platforms.)
- ☐ **Digital Video** (Includes video ads that appear before, during, or after digital content in a video player, such as YouTube.)
- ☐ Other *(specify and explain):*
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



42%

You indicated that you have used **display advertising** in the past year for the client you spend the most time on. Display ad inventory can be purchased through programmatic transaction methods or through direct deals with publishers. Please review the below descriptions about these transaction methods.

Programmatic: Ads that are purchased programmatically are transacted and fulfilled using automation. In programmatic transactions, the price of each impression is typically determined in an auction conducted automatically before the impression is served.

Direct Deals: Ads that are purchased through a direct negotiation, or “direct deal,” with the publisher. In direct deals, the price of the ad inventory is typically set through a one-to-one negotiation between the advertiser and the publisher rather than through an auction. “Direct deals” include programmatic direct deals, such as programmatic guaranteed deals and preferred deals.

Which of the following transaction methods have you used to purchase **display ad inventory** in the past year for the client you spend the most time on?

(Please select all that apply.)

- ☐ Direct Deals
- ☐ Programmatic
- ☐ None of the above
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



45%

You indicated that you have used **social advertising** in the past year for the client you spend the most time on. Which of the following social media platforms, if any, have you used in the past year for the client you spend the most time on?

(Please select all that apply.)

- ☐ Facebook
- ☐ Pinterest
- ☐ Snapchat
- ☐ Tumblr
- ☐ TikTok
- ☐ Twitter
- ☐ Reddit
- ☐ Instagram
- ☐ LinkedIn
- ☐ FriendLinx
- ☐ Other social media platforms *(specify):*
- ☐ None of the above
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

48%

In the **last 12 months**, in which of the following ways have you personally been involved in **digital display** advertising efforts on behalf of the client you spend the most time on?

(Select all that apply.)

- ☐ I determine or advise the client regarding overall strategies and/or budgets for digital display.
- ☐ I regularly use self-serve ad platforms to manage digital display campaigns for the client.
- ☐ I oversee a team/individuals that measure(s) results of digital display campaigns for the client.
- ☐ I oversee a team/individuals that set(s) up audience/target parameters for programmatic digital display buying for the client.
- ☐ I regularly set up audience/target parameters for programmatic digital display buying for the client.
- ☐ I determine or advise the client regarding which buying tools and/or demand-side platforms (DSPs) to use for digital display.
- ☐ I measure results of digital display campaigns for the client.
- ☐ I oversee a team/individuals that use(s) self-serve ad platforms to manage digital display campaigns for the client.
- ☐ None of the above
- ☐ Don't know/Unsure

[Continue »](#)

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



49%

This question is testing whether or not you're paying attention while taking this survey. Please select "Somewhat likely" below.

(Please select only one option.)

- ☐ Not at all likely
- ☐ Not likely
- ☐ Neither unlikely nor likely
- ☐ Somewhat likely
- ☐ Very likely
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

MAIN QUESTIONNAIRE



52%


You have been selected to answer additional questions about your advertising practices for **the client you spend the most time on**. Please continue to think about the client you spend the most time on and answer the questions from the perspective of that client. If there are multiple clients you spend the most time on, please answer the following questions from the perspective of the most typical of those clients.

For each question, if you don't know or are unsure, please don't guess. Simply indicate this in your response by selecting the "Don't know/Unsure" option. There are no right or wrong answers.

Also, you should complete this survey without stopping in the middle. Please make sure not to consult anyone; use your browser's "Back" button; or open another browser while working on this survey.

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

AD PROS™
ADVERTISER PERCEPTIONS

55%

Which of the following best describes your involvement in each of these activities for the client you spend the most time on?

(Please select a value on the slider between 0 and 100 for each activity. If you do not have an answer, please select "Don't know/Unsure".)

Deciding where to advertise

→

I am not involved in these decisions = 0

I am the primary decision-maker = 100

☐ Don't know/Unsure

Deciding whether to purchase display ads programmatically or through direct deals with publishers

→

I am not involved in these decisions = 0

I am the primary decision-maker = 100

☐ Don't know/Unsure

Making changes to a campaign based on its performance

→

I am not involved in these decisions = 0

I am the primary decision-maker = 100

☐ Don't know/Unsure

Measuring performance of display ad campaigns

→

I am not involved in these decisions = 0

I am the primary decision-maker = 100

☐ Don't know/Unsure

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

Increasing/decreasing spending on a particular type of advertising

→

I am not involved in these decisions = 0

I am the primary decision-maker = 100

☐ Don't know/Unsure

Determining initial advertising budget

→

I am not involved in these decisions = 0

I am the primary decision-maker = 100

☐ Don't know/Unsure

Allocating budget across different advertising types

→

I am not involved in these decisions = 0

I am the primary decision-maker = 100

☐ Don't know/Unsure

Increasing/decreasing spending on a particular ad campaign

→

I am not involved in these decisions = 0

I am the primary decision-maker = 100

☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



59%

The following questions pertain to **digital advertising**.

Previously, you mentioned that the client you spend the most time on has used the following types of **digital advertising** in the past year. What is your best estimate of the share of the **digital advertising** budget of the client you spend the most time on that was used for each of these types of advertising in the past year? Specifically, please allocate 100% across the different types of digital advertising shown below based on the share of your client's total digital advertising budget spent on each type. The total should add up to 100%.

To review the advertising type descriptions, hover your mouse over each digital advertising type.

(Please enter a number from 0 to 100 in each cell, or select "Don't know/Unsure." Please make sure that numbers add up to 100.)

Programmatic Display	<input type="text"/> %
Direct Deals Display	<input type="text"/> %
Search	<input type="text"/> %
Digital Video	<input type="text"/> %
Social	<input type="text"/> %
Don't know/Unsure	<input type="checkbox"/>
Total: 0 %	

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



62%

Please read carefully. Now suppose that, based on your analysis, the cost of **programmatic display advertising** has **recently increased by a small but significant amount, and will remain elevated for the foreseeable future.** Assume further that, based on similar analyses for other digital advertising types, the **costs of other digital advertising types** have **not** changed and are not expected to change.

So, for **the client you spend the most time on**, if the cost of programmatic display advertising increases (while the cost of other advertising types remains the same), **will you or won't you divert some of your advertising spending for the coming year to other types of digital advertising?**

- ☐ Yes, I will divert some of my advertising spending for the coming year to other types of digital advertising.
- ☐ No, I will **not** divert any of my advertising spending for the coming year to other types of digital advertising.
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



65%

To which other types of digital advertising below, if any, would you divert your advertising spending for the coming year for **the client you spend the most time on**, as a result of the increase in the cost of programmatic display advertising?


To review the advertising type descriptions, hover your mouse over each digital advertising type.

(Please select all that apply.)

- ☐ Digital Audio
- ☐ eCommerce Platforms
- ☐ Search
- ☐ Direct Deals Display
- ☐ App/In-App
- ☐ Digital Video
- ☐ Social
- ☐ Email
- ☐ Connected TV
- ☐ Other
- ☐ None of the above
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

 **AD PROS™**
ADVERTISER PERCEPTIONS

00%

In your previous answer, you indicated that the increase in the cost of programmatic display advertising will lead you to divert some of your advertising spending to the types of digital advertising listed below.

Please use the sliders below to indicate, on a scale of 0 to 10, the extent to which you would divert (that is, increase) advertising spending for the coming year for the client you spend the most time on to each type of digital advertising that you just indicated.

For each digital advertising type below, please select 0 if you expect to keep spending on that type of digital advertising for the coming year and 10 if you expect to substantially increase spending on that type of digital advertising.

To review the advertising type descriptions, hover your mouse over each digital advertising type.

Search

0

1

2

3

4

5

6

7

8

9

10

Keep the same

Substantially Increase

☐ Don't know/Unsure

Direct Deals Display

0

1

2

3

4

5

6

7

8

9

10

Keep the same

Substantially Increase

☐ Don't know/Unsure

Digital Video

0

1

2

3

4

5

6

7

8

9

10

Keep the same

Substantially Increase

☐ Don't know/Unsure

Social

0

1

2

3

4

5

6

7

8

9

10

Keep the same

Substantially Increase

☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



68%

An ad buying tool is a programmatic advertising platform that allows advertisers and media buying agencies to bid automatically on display ad inventory from a wide range of publishers. Some ad buying tools can also be used to buy video and search ad inventory. Ad buying tools include demand side platforms, or “DSPs.”

Which of the following ad buying tools, if any, have you used in the **past year** for **programmatic display advertising** for the client you spend the most time on?

(Please select all that apply.)

MediaMath DSP	<input type="checkbox"/>	Criteo	<input type="checkbox"/>
The Trade Desk DSP	<input type="checkbox"/>	Xandr Invest	<input type="checkbox"/>
Basis by Centro	<input type="checkbox"/>	Beeswax	<input type="checkbox"/>
Adobe Advertising Cloud	<input type="checkbox"/>	Yahoo DSP (formerly Verizon Media DSP)	<input type="checkbox"/>
Outbrain	<input type="checkbox"/>	Simpli.fi	<input type="checkbox"/>
Adform	<input type="checkbox"/>	Amobee	<input type="checkbox"/>
Quorexx	<input type="checkbox"/>	Zeta Global	<input type="checkbox"/>
Taboola	<input type="checkbox"/>	Amazon DSP	<input type="checkbox"/>
Ad Step Technologies	<input type="checkbox"/>	Adelphic	<input type="checkbox"/>
Google Display and Video 360 (DV360)	<input type="checkbox"/>	Quantcast	<input type="checkbox"/>
Google Ads	<input type="checkbox"/>	Other <i>(please specify):</i> <input type="text"/>	<input type="checkbox"/>
illumin (formerly AcuityAds)	<input type="checkbox"/>	Don't know/Unsure	<input type="checkbox"/>
StackAdapt	<input type="checkbox"/>		

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



70%

Why did you use more than one **ad buying tool** for **programmatic display advertising** in the past year for the client you spend the most time on?

(Please type in your response, or select "Don't know/Unsure".)

☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



70%

Do you expect to use the same number, more, or fewer **ad buying tools** for **programmatic display advertising** next year for the client you spend the most time on?

(Please select only one option.)

- ☐ I expect to use the **same number** of ad buying tools for programmatic display advertising next year for the client I spend the most time on.
- ☐ I expect to use **more** ad buying tools for programmatic display advertising next year for the client I spend the most time on.
- ☐ I expect to use **fewer** ad buying tools for programmatic display advertising next year for the client I spend the most time on.
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



73%

You indicated that, compared to the past year, you expect to use **more ad buying tools** for programmatic display advertising next year for the client you spend the most time on. Why do you expect to use **more** ad buying tools for **programmatic display advertising** next year for the client you spend the most time on?

(Please type in your response or select "Don't know/Unsure".)

☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



75%

Which of the following factors, if any, do you consider when deciding to use a particular **ad buying tool** for **programmatic display advertising** for the client you spend the most time on?

(Please select all that apply.)

- ☐ Media optimization of placements during a campaign
- ☐ Brand safety/fraud protection
- ☐ Forecasting tools
- ☐ Cost
- ☐ Audience scale/Reach
- ☐ Ad placement effectiveness
- ☐ API and integrations
- ☐ Support
- ☐ Identity management
- ☐ Reporting features
- ☐ Ease of use/User interface
- ☐ Budget management tools
- ☐ Targeting criteria and capabilities
- ☐ Troubleshooting capabilities
- ☐ Other *(please specify):*
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



77%

Have you stopped using any **ad buying tool(s)** for **programmatic display advertising** in the **past year** for the client you spend the most time on?

(Please select only one option.)

- ☐ Yes, I stopped using at least one ad buying tool in the past year for the client I spend the most time on.
- ☐ No, I have **not** stopped using any ad buying tools in the past year for the client I spend the most time on.
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



80%

You indicated that you stopped using at least one **ad buying tool** in the **past year** for **programmatic display advertising** for the client you spend the most time on. What factors led you to stop using one or more ad buying tools for **programmatic display advertising** for the client you spend the most time on?

(Please type your response in the text box below, or select "Don't know/Unsure".)

☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



82%

Have you started using any **ad buying tool(s)** in the **past year** for **programmatic display advertising** for the client you spend the most time on?

(Please select only one option.)

- ☐ No, I have **not** started using any ad buying tools in the past year for the client I spend the most time on.
- ☐ Yes, I started using at least one ad buying tool in the past year for the client I spend the most time on.
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



84%

You indicated that you started using at least one **ad buying tool** in the **past year** for **programmatic display advertising** for the client you spend the most time on. What factors led you to start using one or more ad buying tools for **programmatic display advertising** for the client you spend the most time on?

(Please type your response in the text box below, or select "Don't know/Unsure".)

☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



85%

Which of the following metrics, if any, do you use to assess the performance of programmatic display ads, direct deals display ads, social media ads and/or digital video ads for the client you spend the most time on?

To review the advertising type descriptions, hover your mouse over each digital advertising type.

(Please select all that apply in each column.)

	Programmatic display ads	Digital video ads	Direct deals display ads	Social media ads
Cost per impression (CPM)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clicks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost per click (CPC)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Return on Investment (ROI)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Return on Ad Spend (ROAS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Impressions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost per action (CPA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conversions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Click through rate (CTR)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify): <input type="text"/>	<input type="checkbox"/>			
Other (please specify): <input type="text"/>			<input type="checkbox"/>	
Other (please specify): <input type="text"/>				<input type="checkbox"/>
Other (please specify): <input type="text"/>		<input type="checkbox"/>		
None of the above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Don't know/Unsure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



88%

You indicated that you use the following metrics to assess the performance of **programmatic display ads** for the client you spend the most time on. Please rank these metrics in terms of **how important they are to accurately assessing the performance of programmatic display ads**, with 1 being the most important and 2 being the least important.

(Please rank the following metrics, or select "Don't know/Unsure".)

Cost per
impression (CPM)

Cost per click
(CPC)

Rank 1

Rank 2

Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



90%

How often, if at all, do you measure or assess the performance of the **programmatic display advertising** for the client you spend the most time on?

(Please select only one option.)

- ☐ Daily
- ☐ Weekly
- ☐ Monthly
- ☐ Quarterly
- ☐ Annually
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



92%

In the past year, have you run any experiments or test & learn initiatives to assess the performance of the **programmatic display ads** for the client you spend the most time on?

(Please select only one option.)

- ☐ Yes
- ☐ No
- ☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



95%

Which of the following types of experiments or test & learn initiatives, if any, have you run in the past year to assess the performance of the **programmatic display ads** for the client you spend the most time on?

I have run experiments and/or test & learn initiatives testing...

(Please select all that apply.)

☐ ROI/ROAS

☐ Creatives

☐ Audiences

☐ Ad buying tool performance

☐ Bid strategies

☐ Publishers

☐ Other *(please specify):*

☐ Don't know/Unsure

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

FOLLOW UP QUESTION



96%

This survey is being conducted by consultants that have been retained on behalf of Google in connection with pending antitrust lawsuits in which the plaintiffs allege that Google engaged in anticompetitive conduct related to digital advertising.

If you are willing to participate in this survey, please click “Include my responses” below. As a reminder, your responses will be kept anonymous and will be analyzed as part of a larger sample of responses.

If you do not want to participate in this survey, please click “Exclude my responses” below.

☐ Include my responses

☐ Exclude my responses

Continue »

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER



Thank you for taking our survey. Your efforts are greatly appreciated!

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

APPENDIX H.3 AGENCY SURVEY RAW DATA

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

PRODUCED AS NATIVE

HIGHLY CONFIDENTIAL – SUBJECT TO PROTECTIVE ORDER

APPENDIX I

NO CONTACT LIST

APPENDIX I

NO CONTACT LIST AS OF AUGUST 15, 2023

Entity	Type of Entity
33 Across	Ad Tech Provider
Accenture Federal Services	Ad Agency
AccuWeather	Publisher
AdButler & Sparklit Networks, Inc.	Ad Tech Provider
AdClickMedia	Ad Tech Provider
Adform	Ad Tech Provider
AdGlare	Ad Tech Provider
Adning	Ad Tech Provider
Adobe Inc.	Ad Tech Provider
AdRecover	Ad Tech Provider
Adsmovil	Ad Agency
Adsterra	Ad Tech Provider
Advance Publications, Inc.	Publisher
Advertising Council, Inc., The (AdCouncil)	Ad Agency
Aim Media Indiana Operating, LLC	Publisher
AIM Media Midwest Operating, LLC	Publisher
AIM Media Texas Operating, LLC	Publisher
Alaska Department of Labor	State Agency
Alaska Department Of Revenue	State Agency
Alaska Office Of Veterans Affairs	State Agency
Alaska, State of	State / Territory
Alden Global Capital	Publisher
Alhurra, Inc.	Advertiser
Ally Financial	Advertiser
Altice	Publisher
Amazon (including Twitch (ad server))	Ad Tech Provider
American Express	Advertiser
Amtrak (The National Railroad Passenger Corporation)	Federal Agency
ANGI	Advertiser
Anheuser Busch Inbev	Advertiser
Apco	Ad Agency
Apollo (including Verizon Media/Yahoo, Oath, Adapt.tv, Brightroll, Nexage, and Michaels (Publisher))	Ad Tech Provider
Appen Media Group, Inc.	Publisher

APPENDIX I

NO CONTACT LIST
AS OF AUGUST 15, 2023

Entity	Type of Entity
Apple (including AppleNews (publisher))	Ad Tech Provider
AppLovin Corporation / MoPub	Ad Tech Provider
Aptive Resources, LLC	Ad Agency
Arizona Game & Fish Department	State Agency
Arizona State University	State Agency
Arizona, State of	State / Territory
Arkansas Department of Parks, Heritage and Tourism	State Agency
Arkansas Division Of Higher Education	State Agency
Arkansas, State of	State / Territory
Arrieta, Nicholas	Advertiser
Associated Newspapers Ltd.	Publisher
Associated Press, The	Publisher
Astarita, Mark J.	Advertiser
AT&T and subsidiaries (Xandr [f/k/a AppNexus], Warner Bros.)	Ad Tech Provider
Autodesk	Advertiser
Bed, Bath, & Beyond	Publisher
Berkshire Hathaway	Advertiser
Best Buy Co., Inc.	Advertiser
Bidvertiser	Ad Tech Provider
Big Lens	Ad Agency
Bigler, Jason	Ad Tech Provider
Billow Marketing	Ad Agency
Blaine Warren	Ad Agency
Blast Analytics & Marketing	GMP-certified partner
Bloomberg L.P.	Publisher
Boeing	Advertiser
Boland, Brian	Ad Tech Provider
Borgman, Christine L.	Other
Bounteous	GMP-certified partner
Brightcom	Ad Tech Provider
Broadstreet	Ad Tech Provider
Brown County Publishing Company Inc	Publisher
Browne, Simone	Other
Brunet Garcia Advertising Inc.	Ad Agency

APPENDIX I

NO CONTACT LIST AS OF AUGUST 15, 2023

Entity	Type of Entity
Bully Pulpit Interactive	Ad Agency
BuySellAds	Ad Tech Provider
Buzzfeed, Inc.	Publisher
CACI International	Ad Agency
California Department Of Food & Agriculture	State Agency
California, State of	State / Territory
Californians Aware	Other
Campbell Ewald	Ad Agency
Capital Region Independent Media LLC	Publisher
Capitol One, Inc.	Advertiser
Cardinal Path	Reseller
Carmax (including Edmunds)	Publisher
CBC Creative	Ad Agency
Ceasar's Entertainment	Advertiser
Center for Investigative Reporting, The (d/b/a Reveal)	Publisher
Centers for Medicare and Medicaid Services	Federal Agency
Central Michigan University	State Agency
Charles Tombras Advertising, Inc.	Ad Agency
Charleston Publishing Co., Inc.	Publisher
Choozle	Ad Tech Provider
Clarion Publishing Company, Inc.	Publisher
Clarke Publishing, Inc.	Publisher
Clarksburg Publishing Company (doing business as WV News)	Publisher
Clickso	Advertiser
Cliffy Care Landscaping LLC	Advertiser
Coastal Point LLC	Publisher
Coca-Cola	Advertiser
College Of Southern Nevada	State Agency
College of Western Idaho	State Agency
Colorado Office Of Early Childhood	State Agency
Colorado State University	State Agency
Colorado, State of	State / Territory
Comcast (including FreeWheel, Beeswax, NBCUniversal (Publisher), Fandango, and Xfinity (Publisher))	Publisher / Ad Tech Provider

APPENDIX I

NO CONTACT LIST AS OF AUGUST 15, 2023

Entity	Type of Entity
Commonwealth Publishing Company, Inc.	Publisher
comScore Media Measurement	Ad Tech Provider
CondeNast	Publisher
Connecticut Department Of Transportation	State Agency
Connecticut, State of	State / Territory
Consumable	Ad Tech Provider
Consumer Financial Protection Bureau	Federal Agency
ContextLogic Inc.	Advertiser
Criteo (including BidSwitch, Iponweb, and MediaGrid)	Ad Tech Provider
Crosby Marketing	Ad Agency
Custom Ink	Advertiser
CVP Corp. (f/k/a Atlas Research) OR Customer Value Partners, Inc.	Ad Agency
CVS Health Corp.	Publisher
Daily Beast, The	Publisher
Dallas Morning News, The	Publisher
Daniel J. Edelman, Inc. (d/b/a Edelman)	Ad Agency
Deloitte	Ad Agency
Delta Air Lines, Inc.	Advertiser
Delta Press Publishing Company, Inc.	Publisher
Delta-Democrat Publishing Company	Publisher
Demas, Bill (former Chief Executive Officer of Turn)	Ad Tech Provider
Denton Media Company / Denton Record Chronicle	Publisher
Dentsu	Ad Agency
Departamento de Educación de Puerto Rico	State Agency
Department of Defense (including U.S. Air Force, U.S. Army, and U.S. Navy)	Federal Agency
Devaney, Michael	Advertiser
Diffie, Whitfield	Other
Digg.com	Publisher
Digital Advertising Alliance	Industry Trade Organization / Trade Association
Digital Content Next	Industry Trade Organization / Trade Association
Digital Turbine (including AdColony and Fyber (SSP Mobile/In-app))	Ad Tech Provider
District Communications Group, LLC, The	Ad Agency
Dot Dash	Advertiser
DoubleVerify	Ad Tech Provider

APPENDIX I

NO CONTACT LIST AS OF AUGUST 15, 2023

Entity	Type of Entity
Dow Jones & Company, Inc.	Publisher
Dr. Pepper Snapple Group	Advertiser
Drug Enforcement Administration (DEA)	Advertiser
DuckDuckGo	Other
Duty First Consulting LLC	Ad Agency
Eagle Printing Company	Publisher
Eastern Kentucky University	State Agency
eBay	Publisher
ECENT Corporation	Publisher
Elevation, Ltd.	Ad Agency
Emmerich Newspapers, Incorporated	Publisher
Enterprise-Tocsin, Inc.	Publisher
E-Planning (ePlanning)	Ad Tech Provider
Epom	Ad Tech Provider
Epsilon	Ad Tech Provider
Equativ (including Smart AdServer, DynAdmic, and LiquidM)	Ad Tech Provider
Etsy, Inc.	Publisher
Evadav	Ad Tech Provider
Exeter Government Services	Ad Agency
Experian	Ad Tech Provider
Eyeo (including Trestle)	Other
Ezoic	Ad Tech Provider
FanDuel 93.7	Advertiser
Fannie Mae (Federal National Mortgage Association)	Federal Agency
Farber, David	Other
Federal Bureau of Investigation (FBI)	Advertiser
Federal Bureau of Prisons (FBP)	Advertiser
Federal Trade Commission	Federal Agency
Fifty-Five	GMP-certified partner
First Amendment Coalition	Industry Trade Organization / Trade Association
Fischer, Addison	Other
Flag Publications, Inc.	Publisher
Fleishman Hillard	Ad Agency
Florida Department Of Agriculture & Consumer Services	State Agency

APPENDIX I

NO CONTACT LIST
AS OF AUGUST 15, 2023

Entity	Type of Entity
Florida Department Of Corrections	State Agency
Florida Department of Economic Opportunity	State Agency
Florida Department Of Education	State Agency
Florida Department Of Environmental Protection	State Agency
Florida Department Of State	State Agency
Florida Department Of Transportation	State Agency
Florida Fish & Wildlife Conservation Commission	State Agency
Florida, State of	State / Territory
Fors Marsh Group	Ad Agency
Fox Corporation	Publisher
Franklinton Publishing Co., Inc.	Publisher
Future of Privacy Forum	Industry Trade Organization / Trade Association
Gale Force Media, LLC	Publisher
Gannett Co., Inc.	Publisher
General Motors	Advertiser
Genius Media Group, Inc.	Publisher
Gould Enterprises, Inc.	Publisher
Grenada Star, Inc.	Publisher
Guardian, The	Publisher
GumGum	Ad Tech Provider
Hanson Law Firm, PC	Advertiser
Hattiesburg Publishing, Inc.	Publisher
Havas Media	Ad Agency
HD Media Company, LLC	Publisher
Hearst Communications, Inc. (including the Houston Chronicle)	Publisher
Hilton Worldwide Holdings, Inc.	Advertiser
Hispanic Communications Network (HCN)	Ad Agency
Holt, Rush	Other
Horizon Media	Ad Agency
I LOVE NY	State Agency
IAB Tech Lab	Industry Trade Organization / Trade Association
IAC (including Ask Media Group (ad agency))	Publisher
IBM (owner of The Weather Company)	Publisher
Idaho Department Of Health & Welfare	State Agency

APPENDIX I

NO CONTACT LIST AS OF AUGUST 15, 2023

Entity	Type of Entity
Idaho Office Of Drug Policy	State Agency
Idaho Transportation Department	State Agency
Idaho, State of	State / Territory
Illinois Department Of Commerce & Economic Opportunity	State Agency
Illinois, State of	State / Territory
Imgur, Inc.	Publisher
Incubeta	Reseller
IndexExchange	Ad Tech Provider
Indiana Department Of Veterans' Affairs	State Agency
Indiana Municipal Power Agency	State Agency
Indiana University	State Agency
Indiana, State of	State / Territory
InfoLinks	Ad Tech Provider
Inform, Inc.	Publisher
Inmar	Ad Agency
Innovid	Publisher Ad Server; Reseller
Inskin	Publisher
Inspire Brands	Advertiser
Instacart	Publisher
Instapundit.com	Ad Agency
Integral Ad Science	Ad Tech Provider
Inter American Press Association	Industry Trade Organization / Trade Association
Internet Brands, Inc. (owner of PulsePoint (SSP) and WebMD Health Corp. (Publisher))	Publisher / Advertiser
IPG (The Interpublic Group of Companies, Inc.) (including IPG DXTRA, Inc. d/b/a Weber Shandwick; IW Group Inc.; McCann-Erickson USA, Inc.; Universal McCann Worldwide, LLC)	Ad Agency
J.O. Emmerich & Associates, Inc.	Publisher
J.R. Reingold & Associates, Inc. (d/b/a Reingold, Inc.)	Ad Agency
Jacob's Eye	Ad Agency
Jellyfish	Reseller
JLaSalle Enterprises LLC	Publisher
Johnson & Johnson	Advertiser
Jonathan Kanter	Individual

APPENDIX I

NO CONTACT LIST
AS OF AUGUST 15, 2023

Entity	Type of Entity
Journal, Inc.	Publisher
JumpFly	Ad Agency
Kantar Group (majority owned by Bain)	Ad Tech Provider
Kanter LLC	Ad Agency
Kargo Global, Inc. (including StitcherAds)	Ad Tech Provider
Kentucky Cabinet for Public Health	State Agency
Kentucky Community & Technical College System	State Agency
Kentucky Tourism, Arts, and Heritage Cabinet	State Agency
Kentucky, Commonwealth of	State / Territory
Kevel f/k/a AdZerk	Ad Tech Provider
Kinin, Inc.	Advertiser
Klonick, Kate	Other
Kohl's Corp.	Advertiser
Kosciusko Star-Herald, Inc.	Publisher
Kranzler Kingsley Communications Ltd.	Ad Agency
LA Times	Publisher
Lewis, Harry	Other
LG Electronics	Advertiser
Liberty Mutual	Advertiser
Liftable Media	Publisher
Liftoff (including information re Vungle)	Ad Tech Provider
LinkedIn	Ad Tech Provider
LiveNation Entertainment Inc	Advertiser
LMI (Logistics Management Institute)	Federal Contractor
Long & Foster Real Estate Companies	Advertiser
Louisiana Dept of Children and Family Services	State Agency
Louisiana Office of Tourism	State Agency
Louisiana State University	State Agency
Louisiana, State of	State / Territory
Louisville Publishing, Inc.	Publisher
Lowe's Companies, Inc.	Advertiser
LVMH	Advertiser
Macy's Inc.	Publisher / Advertiser
MadAds Media	Ad Tech Provider

APPENDIX I

NO CONTACT LIST
AS OF AUGUST 15, 2023

Entity	Type of Entity
Magnite (including Rubicon Project, Telaria, Carbon, SpotX, RTK Header Bidding, and SpringServe (ad server))	Ad Tech Provider
Mail Media, Inc. (Daily Mail)	Publisher
Major League Baseball	Publisher
Marin	Ad Tech Provider
Marion Publishing Company	Publisher
Mars, Inc.	Advertiser
Marx, Gary	Other
Match Group	Advertiser
McClatchy Company, The	Publisher
McNamee, Roger	Other
MDC Partners (Stagwell, Inc.)	Ad Agency
Media Institute, The	Other
Media.Monks	Reseller
Media.net	Ad Tech Provider
MediaMath, Inc.	Ad Tech Provider
Mediavine	Publisher
Merck	Advertiser
Meredith Corp.	Publisher
Merkle	Reseller
Meta Platforms, Inc. (f/k/a Facebook Inc.)	Ad Tech Provider
Michigan Department of Labor and Economic Opportunity	State Agency
Michigan, State of	State / Territory
Microsoft (including Xandr, MSN (Publisher), LinkedIn, Tapad, and Drawbridge)	Ad Tech Provider
Mighty Hive	GMP-certified partner
Mikula Web Solutions, Inc.	Publisher
Mindshare USA, LLC	Ad Agency
Minnesota Department Of Health	State Agency
Minnesota, State of	State / Territory
Mint Rose Day Spa LLC	Advertiser
MIQ Digital USA Inc.	Ad Agency
Mississippi Department Of Public Safety	State Agency
Mississippi Development Authority	State Agency
Mississippi State University	State Agency

APPENDIX I

NO CONTACT LIST
AS OF AUGUST 15, 2023

Entity	Type of Entity
Mississippi, State of	State / Territory
Missouri Department Of Transportation	State Agency
Missouri Division of Tourism	State Agency
Missouri, State of	State / Territory
MLex	Publisher
Monster Government Solutions Inc.	Ad Agency
Montana Office of Tourism	State Agency
Montana State University	State Agency
Montana, State of	State / Territory
Montgomery Publishing Co., Inc.	Publisher
Monumetric	Ad Tech Provider
Mother Jones	Publisher
Motley Fool	Publisher
Mozilla	Other
Multi Media Channels LLC	Publisher
Nation Company, L.P., The	Publisher
National Aeronautics and Space Administration	Federal Agency
National Football League	Publisher
National Freedom of Information Coalition	Other
National Highway Traffic Safety Administration	Federal Agency
National Press Photographers Association	Industry Trade Organization / Trade Association
Navy Federal Credit Union	Advertiser
Nebraska Department Of Transportation	State Agency
Nebraska, State of	State / Territory
Neeva	Advertiser
Negron, Kimberly	Advertiser
Neighborhood Newspapers, Inc.	Publisher
Nestle	Advertiser
Netflix	Publisher
Network Advertising Initiative	Industry Trade Organization / Trade Association
Nevada Department of Health & Human Services [Voluntary Production]	State Agency
Nevada Department Of Motor Vehicles	State Agency
Nevada Department of Tourism & Cultural Affairs	State Agency
Nevada Silver State Health Insurance Exchange	State Agency

APPENDIX I

NO CONTACT LIST AS OF AUGUST 15, 2023

Entity	Type of Entity
Nevada State Treasurer	State Agency
Nevada, State of	State / Territory
New Hampshire Department of Natural & Cultural Resources	State Agency
New Hampshire, State of	State / Territory
New Jersey Department Of Health & Senior Services	State Agency
New Jersey, State of	State / Territory
New York State Energy Research & Development Authority	State Agency
New York Times Company, The	Publisher
New York, State of	State / Territory
News Corp.	Publisher
News Leaders Association, The	Other
News Media Alliance	Industry Trade Organization / Trade Association
News Media Association	Industry Trade Organization / Trade Association
Newton County Appeal Inc.	Publisher
Nexstar	Publisher
Nexstar Media Group, Inc.	Publisher
NextRoll (including AdRoll)	Ad Tech Provider
Nielsen Holdings	Ad Tech Provider
Nike	Advertiser
Nobid	Ad Tech Provider
North Carolina Department Of Health & Human Services	State Agency
North Carolina, State of	State / Territory
North Dakota Department Of Health (aka North Dakota Department of Health and Human Services)	State Agency
North Dakota Department of Human Services	State Agency
North Dakota, State of	State / Territory
North Texas Tollway Authority	State Agency
Northrup Grunman	Advertiser
NVR, Inc.	Advertiser
O'Kelley, Brian (former Chief Executive Officer of AppNexus)	Ad Tech Provider
Omnicom Group, Inc. (including DDB Chicago, Inc., Team DDB, GMMB, GSD&M LLC, Ketchum, Inc., OMD Worldwide, and Porter Novelli Inc.)	Ad Agency
OneMobile	Ad Tech Provider
OpenX Technologies, Inc.	Ad Tech Provider

APPENDIX I

NO CONTACT LIST
AS OF AUGUST 15, 2023

Entity	Type of Entity
Oracle (including Moat)	Ad Tech Provider
Organic Panaceas, LLC	Advertiser
Outbrain (including Zemanta (DSP) and AdNgin (Ad Server))	Ad Tech Provider
Pandora (Sirius XM Radio Inc.)	Publisher
Paramount Global (including CBS, Audacy Radio (owned by CBS), Viacom)	Publisher
PBS	Publisher
Peace Corps	Advertiser
Peel, Deborah C.	Other
Penske Media Corp.	Publisher
PepsiCo	Advertiser
Pinger	Publisher
Pinterest, Inc.	Ad Tech Provider
POLITICO LLC	Publisher
PopAds	Ad Tech Provider
PopCash	Ad Network
Prebid Header Bidding	Ad Tech Provider
Prevention Magazine	Publisher
Proctor & Gamble	Advertiser
Progressive Insurance	Advertiser
Progressive, Inc., The	Publisher
PropellerAds	Ad Tech Provider
Publica	Ad Tech Provider
Publicis Groupe, The (including Epsilon, Conversant, Publicis North America, and Publicis Media, Inc.)	Ad Agency
PubMatic, Inc.	Ad Tech Provider
Puerto Rico Department of Labor and Human Resources	State Agency
Puerto Rico Tourism Company	State Agency
Puerto Rico, Commonwealth of	State / Territory
Qualcomm	Advertiser
Quantcast	Ad Tech Provider
Raintree Medical And Chiropractic Center LLC	Advertiser
Reddit	Publisher
Rent-A-Center	Advertiser
Reporters Committee for Freedom of the Press, The	Other

APPENDIX I

NO CONTACT LIST
AS OF AUGUST 15, 2023

Entity	Type of Entity
Reuters News & Media Inc.	Publisher
RevContent	Ad Tech Provider
Revive	Ad Tech Provider
Rhode Island Department Of Health	State Agency
Rhode Island, State of	State / Territory
Richter 7 Inc.	Ad Agency
Robinson Communications Inc	Publisher
Rodrock Chiropractic Pa	Advertiser
Roku, Inc. (including DataXu (DSP))	Ad Tech Provider
Rome News Media, LLC	Publisher
Rutgers, The State University of New Jersey	State Agency
Samsung Electronics America, Inc. (including Samsung NEXT, LLC)	Advertiser
Savannah Publishing Co., Inc.	Publisher
SC Department of Social Services	State Agency
Schneier, Bruce	Other
Scott Publishing, Inc.	Publisher
Search Discovery	GMP-certified partner
Sharethrough Inc. (including DistrictM)	Ad Tech Provider
SHE Media	Ad Tech Provider
Simpson Publishing Co., Inc.	Publisher
Singh, Sunny	Advertiser
Skechers	Advertiser
Skimlinks	Ad Tech Provider
SkinnySchool LLC d/b/a Maria Marques Fitness	Advertiser
Smartly.io	Reseller
Smithsonian Institution	Advertiser
Snap, Inc.	Ad Tech Provider
Society of Professional Journalists	Other
Something Extra Publishing, Inc.	Publisher
Sonobi	Ad Tech Provider
Sortable / Freestar	Ad Tech Provider
South Carolina Department of Parks, Recreation, and Tourism	State Agency
South Carolina, State of	State / Territory
South Dakota Department of Education	State Agency

APPENDIX I

NO CONTACT LIST AS OF AUGUST 15, 2023

Entity	Type of Entity
South Dakota Department Of Human Services	State Agency
South Dakota State University	State Agency
South Dakota, State of	State / Territory
Southern Arkansas University	State Agency
Southern Community Newspapers, Inc.	Publisher
Southern Utah University	State Agency
Sovrn Holdings, Inc.	Ad Tech Provider
Spotify	Publisher
SPX Total Body Fitness LLC	Advertiser
StackAdapt	Ad Tech Provider
Starbucks	Advertiser
State Farm	Advertiser
State University Of New York	State Agency
Static Media	Publisher
Stellman, Michael	Advertiser
Sterling International Consulting Group	Publisher
Stratacomm LLC	Ad Agency
Strava	Publisher
Sunland Publishing Company, Inc.	Publisher
Surefreight Global LLC	Advertiser
Susan Athey	Individual
Sweepstakes Today, LLC	Publisher
T. Rowe Price	Advertiser
Taboola	Ad Tech Provider
Tallulah Publishing, Inc.	Publisher
Target Corporation	Publisher
Tate Record, Inc.	Publisher
Teads	Ad Tech Provider
Tennessee Highway Safety Office	State Agency
Tennessee, State of	State / Territory
Tennis.com	Publisher
Texas A&M University	State Agency
Texas Department of Information Resources, The (DIR)	State Agency
Texas Department Of Motor Vehicles	State Agency

APPENDIX I

NO CONTACT LIST AS OF AUGUST 15, 2023

Entity	Type of Entity
Texas Department Of Transportation	State Agency
Texas General Land Office, The	State Agency
Texas Office of the Governor, Economic Development & Tourism	State Agency
Texas, State of	State / Territory
The Bureau of Alcohol, Tobacco, Firearms and Explosives (ATF)	Advertiser
The Goodway Group	Ad Agency
TIAA	Advertiser
Ticketmaster	Publisher
Tiktok	Ad Tech Provider
Timehop (creator of Nimbus)	Ad Tech Provider
Times Journal, Inc.	Publisher
Tinuiti	Ad Agency
Trade Desk, Inc., The	Ad Tech Provider
Tremor International Ltd. (including RhythmOne/Unruly (SSP), Unruly Group Limited, Amobee, Inc., Tremor Video, and Spearad GmbH)	Ad Tech Provider
Trilogy Federal, LLC	Ad Agency
TripAdvisor	Publisher / Advertiser
Triple Lift, Inc.	Ad Tech Provider
Trustworthy Accountability Group	Industry Trade Organization / Trade Association
Tully Center for Free Speech	Other
Turkle, Sherry	Other
Turn	Ad Tech Provider
TWC Product & Tech	Publisher
Twitch	Publisher
Twitter, Inc.	Ad Tech Provider
U.S. Air Force	Federal Agency
U.S. Army	Federal Agency
U.S. Census Bureau	Federal Agency
U.S. Department of Agriculture	Federal Agency
U.S. Department of Defense	Federal Agency
U.S. Department of Education	Federal Agency
U.S. Department of Energy	Federal Agency
U.S. Department of Health and Human Services	Federal Agency
U.S. Department of Homeland Security	Federal Agency

APPENDIX I

NO CONTACT LIST AS OF AUGUST 15, 2023

Entity	Type of Entity
U.S. Department of Housing and Urban Development	Federal Agency
U.S. Department of Interior	Federal Agency
U.S. Department of Labor	Federal Agency
U.S. Department of State	Federal Agency
U.S. Department of Transportation	Federal Agency
U.S. Department of Treasury	Federal Agency
U.S. Department of Veterans Affairs	Federal Agency
U.S. General Services Administration	Federal Agency
U.S. Navy	Federal Agency
U.S. Postal Service	Federal Agency
Unilever	Advertiser
Union City Daily Messenger, Inc.	Publisher
United States of America	US Government
United States Social Security Administration	Federal Agency
Unity (including ironSource)	Ad Tech Provider
Universidad de Puerto Rico	State Agency
University of Alaska	State Agency
University Of Arkansas	State Agency
University Of California	State Agency
University Of Connecticut School Of Law	State Agency
University of Florida (including Florida Institute of Food & Agricultural Sciences)	State Agency
University Of Idaho	State Agency
University Of Illinois System	State Agency
University Of Minnesota	State Agency
University Of Missouri	State Agency
University Of Montana, The	State Agency
University Of Nebraska Omaha	State Agency
University Of Nevada	State Agency
University Of North Carolina At Chapel Hill	State Agency
University Of North Dakota	State Agency
University Of Rhode Island	State Agency
University Of South Carolina	State Agency
University Of South Dakota	State Agency
University Of Tennessee, The	State Agency

APPENDIX I

NO CONTACT LIST AS OF AUGUST 15, 2023

Entity	Type of Entity
University Of Texas, The	State Agency
University Of Virginia, The	State Agency
University Of Washington	State Agency
University System Of New Hampshire	State Agency
Univision	Publisher
URX	Ad Tech Provider
US Trade and Development Agency	Advertiser
Utah Department Of Health	State Agency
Utah Office of Tourism	State Agency
Utah, State of	State / Territory
Verizon	Ad Tech Provider
Verizon Communications	
Verve Group, The (including Smaato and AppMonet)	Ad Tech Provider
Viant Technology (including Adelphic Mobile)	Ad Tech Provider
Vimeo	Publisher
Virginia Department For Aging & Rehabilitative Services	State Agency
Virginia, Commonwealth of	State / Territory
Vitor Lindo	Advertiser
Vixie, Paul	Other
Vox Media, Inc. (Concert by Vox)	Ad Tech Provider
Walmart Inc.	Publisher
Walt Disney Company, The (including Hulu, ABC, and ESPN)	Publisher
Warner Bros. Discovery (including CNN, Zedo (SSP), and Turner Entertainment)	Publisher / Ad Tech Provider
Washington Post, The (Nash Holdings LLC)	Publisher
Washington State Department Of Health	State Agency
Washington, State of	State / Territory
Wayfair, Inc.	Advertiser
Weakley County Press, Inc	Publisher
Wells Fargo	Advertiser
West Virginia Department Of Commerce	State Agency
West Virginia University	State Agency
West Virginia, State of	State / Territory
Western Nevada College	State Agency
WNET	Publisher

APPENDIX I

NO CONTACT LIST
AS OF AUGUST 15, 2023

Entity	Type of Entity
Wordpress (owned by Automattic; including OiO Publisher (ad server))	Publisher
WPP (including GroupM Worldwide LLC, VMLY&R, Wavemaker, and Young & Rubicam Inc.)	Ad Agency
Yahoo Inc.	Ad Tech Provider
Yazoo Newspaper Co., Inc.	Publisher
Yberra, Sara	Advertiser
Yelp Inc.	Publisher
Yieldmo, Inc.	Ad Tech Provider
ylliX	Ad Tech Provider
Zedo, Inc.	Ad Tech Provider
Zeta Global (Zeta Interactive)	Ad Tech Provider
Zuboff, Shoshana	Other
Zynga (Take-Two Interactive; including Chartboost)	Other